

Strategic Planning for Non-Profits

Through the planning process, an organization can ask: Where are we now? Where do we want to be?



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Planning is not something that your organization can afford to ignore, or postpone. Planning is one of the most important responsibilities of any non-profit in its capacity of serving the public. Through the planning process, an organization can ask the following:

1. Where are we now?
2. Where do we want to be?
3. How can we get there?
4. How will we do all this?
5. How will we know how successful we are?

There are several models for strategic planning, both many fit into two types of structures:

LINEAR PLANNING

In this process, you proceed from broad statements contained in the mission, to more specific process of action plans. Many options are distilled into only a few.

This approach assumes that planning has a beginning and an end point. The beginning is usually identified as the development of the mission statement; the end point is the formulation of an action plan.

This approach is often used when an organization is conducting long-range planning for the first time. It is also used when wide public involvement is required.

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Linear planning is known for its comprehensive nature. This can also result in the process being slow and frustrating. Once this planning process is completed, it is also difficult to return and modify the original document.

A sample of the linear planning model is outlined below, as excerpted from the SKILLS program:

Situation analysis

- Gather and analyze information about how your organization is functioning now.
- Distribute questionnaires, hold interviews and discussions with a large number of people within your organization. This gives you a strong information base for your planning activities.

Mission statement

- Write the precise and agreed-upon statement of the reason for your organization's existence.
- Review to ensure it is accurate.

Areas of emphasis

- Agree on the major areas of commitment and responsibility within your organization.
- Write a clear strategic statement describing each area of emphasis.

Priorities

- Determine the main responsibilities your organization wants to fulfill over the next four-five years.
- Take a close look at what your organization is doing well, what it needs to improve and where it wants to be in four or five years.

Goals and objectives - the long term plan

- Itemize the details behind your priorities — they translate the mission statement into reality.
- Write each priority as a general goal statement and then create more specific objectives.

Action steps - the short term plan

- Devise the individual tasks that need to be done to achieve the objectives; action steps are usually done for one year; situations and personnel often change quickly and prevent longer term planning.

BENEFITS OF LINEAR PLANNING

Linear planning is ideal for:

- New organizations
- Organizations that have not planned before
- Organizations considering a controversial topic
- Organizations moving into new areas of responsibility

INTEGRATED PLANNING

The integrated approach differs from the linear approach in that it does not have a defined beginning or end point. Within the integrated approach, it is not necessary that activities occur in any particular sequence.

The objective with integrated planning is to achieve a plan in which all components of planning fit together to create a coherent whole. Each of the planning components — from mission statement to goals and objectives to action plans — are developed simultaneously. The results from each planning component can influence the development of the other components.

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Strategic Planning: ICA Method

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Because integrated planning is so fluid, information collection is an ongoing process (unlike linear planning, which relies upon a single information scan). New information continually redefines the original questions asked, and the responses developed through each planning component.

The metaphor used for integrated planning is a wheel. At the middle of the wheel sits the planning coordinator — it is their job to collect information from the various planning groups, communicate new information back to these groups, and fit all the components together into a coherent plan.

The advantage of integrated planning is that it allows an organization to quickly respond to change — whether it is positive or not. All elements of the plan can be reviewed and updated simultaneously. One of the drawbacks, however, is that integrated plans can be less than comprehensive, resulting in poor decision-making by the organization.

BENEFITS OF INTEGRATED PLANNING

Integrated planning is ideal for:

- Day to day planning;
- Ongoing planning work involving many constituents; and
- Planning requiring quick response.

SCOPE OF PLANNING

There are three basic levels of planning in a cultural organization. These levels move from the ideal to the concrete and realistic:

1. **Mission or purpose planning**
2. **Long-term organizational planning (strategic)**
3. **Short-term operational planning**

1. **Mission planning** - What is the dream of the Board? What is it trying to accomplish? That's what the mission tries to capture. This is the cornerstone on which all other planning should take place. It should identify the difference the organization will make by its existence, and should be an outcome statement. Ensure Board and staff consensus on the mission statement.
2. **Long-term planning** - This is a motivational tool and management tool by which you can evaluate and monitor the progress of the organization. Use the long term plan to articulate specific goals in terms of the organization's major areas — programs, finance, personnel, advocacy. Many questions need to be answered during the process, including:
 - Where are we now?
 - Given this assessment and our dreams of the organization's future, what do we want to accomplish within the next five years?
 - What are our organizational goals and objectives for each major area?
 - What is it going to take in terms of resources to get there?
3. **Short-term planning** - This is a one year operational plan — a slice of the long term plan. It is developed by staff, or staff working with the Board. It answers the question — given our objectives and goals over the next five years, what are we going to do this year? It also serves as the basis for Board monitoring of staff and committee performance.

WHO PLANS?

If planning is a participatory process, it ensures buy-in from those who take part. Including Board, staff, and volunteers means they will be better able to communicate the plan to others.

Usually, the Board will assign responsibility and hold staff accountable for implementing approved plans. Performance evaluations and management audits can be facilitated by reference to these plans.

GENERAL THOUGHTS ABOUT STRATEGIC PLANNING

To conclude, we offer some guiding principles to consider, no matter which model you choose to follow to develop your strategic plan:

- **Decentralize** – Get everyone involved in the process.
- **Be flexible** – Debate the future, ask novel questions, encourage flexible thoughts and actions. Don't write a 200 page plan. That will stifle flexibility immediately.
- **Plan from the bottom up** – Execution of your plan will ultimately take place on the front line, so get their input.
- **Destroy it** – Once the plan is shared with all, consider burning the document — to emphasize that it is a living document, and that it is something to inspire, not constrain.

- **Modify often** – The strategic plan’s purpose is to be thought-provoking. That becomes difficult if the document’s content and format is not modified substantially every year.

**[The Handbook for Cultural Trustees](#) is a project of the Samuel and Saidye Bronfman Family Foundation, as part of its Cultural Management Development Program, in cooperation with the board development program of Alberta Culture and Grant MacEwan Community College.

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More in Setting Up a Non-Profit Organization

Registering Non-Profits



Whether an organization decides to incorporate or not depend upon its activities, nature and the type of organization.

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Dissolving Non-Profits



Dissolving a non-profit corporation in Saskatchewan can be achieved by the members, outside authorities, or by a court acting upon a request.