

Module 3.0 Strategic Planning – Setting a Direction for the Organizationⁱ

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3.1 Elements of a Strategic Plan

- 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 become committed to measurable goals, approve priorities for implementation, and also commit to revisiting the organization’s strategies on an ongoing basis as the organization's internal and external environments change. Many nonprofits start the process by identifying the nonprofit’s strengths, weaknesses, opportunities, and threats, in what is commonly called a “SWOT” analysis. Looking at external as well as internal factors (such as your own nonprofit's staff capacity to accomplish its goals) 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 that 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 – and the nonprofit’s strategic priorities - as circumstances change. Some argue for throwing out the “plan” completely, or reducing it to a very short, concise document, easily digestible by staff and board. Articulating and perhaps visualizing an organization's "theory of change" is another way to think about "what success will look like" - how to get there, and what resources it will take to get there. 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. Plus, staying current with trends and policy issues that affect nonprofit operations is key to being prepared to adapt to a changing environment.

3.2 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 part of the nonprofit’s strategic directions in every board meeting agenda.
- Questions to ask include, "Is that strategic initiative still relevant?" "Are the priorities (or tactics) we identified earlier the correct ones for the near future?"

3.3 Tools for Developing a Strategic Plan

- Sample summary plan
- Sample board agenda where strategic plan objectives are the basis for the agenda WID’s strategic plan in brief

3.4 How Strategic Planning Happens at WID

- The strategic planning process and the plan itself, is important to all nonprofits but even more critical component for organizations which do not have clarity and agreed-upon direction for their work or when new critical needs are identified. During my nearly forty years of nonprofit leadership, I've organized, carried out and implemented numerous versions of the strategic planning process and the resulting plan. Here's what always pushed its way to the forefront of every planning process whether it was a yearlong process with consultants and stage-of-the-art software or done with a small group of board members and staff in an afternoon of focused discussion and debate on a specific strategic topic. It is the process now used by WID.
- The WID Planning Process
 - Get Buy-in from critical stakeholders in the process before the process begins.
 - Bring the Board in early and often so that they are in agreement with both the process and resulting plan.
 - Do your homework in advance of the first planning meeting, i.e.; have well-vetted recommendations ready for discussion
 - Set a 3-year direction but focus in detail on the next 12 to 18 months with an eye on ongoing review and revision of the plan direction and elements.
 - Examples of the Process
 - At WID, we pull together external stakeholders to meet with our Board and senior staff to brainstorm with us on the questions below:
 - What are the critical issues facing our community right now?
 - What can be done to address those issues?
 - Are others already in place to address these issues?
 - WID have impact in addressing the potential solutions?
 - Next, we take the outcomes from these discussions and compare them to our current program initiatives.
 - We take stock of our capacity to get the work done and the likelihood of obtaining funding.
 - Then, the Board and senior staff decide whether and how to move forward.
 - Example 1: In 2014 as a result of partnering with a subject matter expert on the topic, we began promoting our thinking that climate change and forced migration has a disproportionate impact on people with disabilities worldwide and no climate change-related planning processes appeared to include people with disabilities in the plans or as part of the planning process.
 - We included climate resilience for the first time in our board-approved program initiatives in 2015. We talked to anyone who would talk to us about the issue, blogged about it, presented on the issue at conferences, community meetings and governmental meetings; with the goal of both gathering and dispensing data.

- From our resulting due diligence, we believed the lack of planning for people with disabilities in numerous climate change realities was of critical concern. We believed that education and planning was at least a partial solution. We found that very little was being done to address this and we believed that WID could have significant impact on the issue.
- After a 4-year dearth in funding but an ever-increasing level of interest from external stakeholders, we have initial funding to develop a pilot program exploring transportation, evacuation and early warning processes for people with disabilities when natural disasters, rising seas and drought force emergency migration or planned relocation.
- This planning process was not linear, did not have hard deadlines or timelines but did have a gradual movement forward that allowed us to stay the course. We had the subject matter expertise to address the issue. We knew there were funds available for climate change related planning but didn't know if we could convince funders that disability in general and WID specifically was worthy of funding.
- Example 2: In 2017, WID held a strategic planning dinner where 65 external stakeholders were invited to engage in discussion over dinner with their tablemates on topical areas of interest to WID and our future planning.
 - Nine tables of subject matter experts from a variety of arenas put their thoughts on the table on topics such as, access technology, financial education, disability benefits, employment empowerment, national policy agendas and the like.
 - The table tasked with identifying issues of importance to a national policy agenda developed a list of over a dozen areas of critical importance, many of which had potential solutions and most on which WID could have impact.
 - WID board members from the board's Public Policy Committee who were seated at that table heard clearly from the other table participants that intersectionality—ensuring that people with disabilities from multiple-marginalized communities—were included in WID's work before any new specific national policy work was undertaken.
 - What happened? Within two months, the Board Public Policy Committee had approved an intersectionality project for WID where we would use our own organization as the laboratory for reviewing and revising our engagement and recruitment practices to intentionally increase involvement by people from multiple-marginalized communities in our work and that we would also

explore how our program initiatives were carried out to guard against exclusion rather than inclusion.

- This is an example of a very swift strategic planning process on a specific issue generated by the representatives of a marginalized community raised directly to the WID Board through an open opportunity toward information gathering and engagement. Absent from the evaluation of the topical area was whether funding was available as we agreed to make the program as cost neutral as possible in order to move forward quickly. (Anita Aaron, World Institute on Disability, 2019)

ⁱ Parts of this Module are Published on National Council of Nonprofits (<https://www.councilofnonprofits.org>)