



## **10 Tips to Make Strategic Planning Waaaay Easier**

By Bruce Miles, EdD

Charting an effective course for your nonprofit does not require days of valuable work time. The following steps can help you stay on task, increase buy-in, and develop a strategic plan that won't gather dust — in as few as five hours.

1. **Pitch A Big Tent** — Invite a cross-section of administrators, board members, staff and donors to a two-hour session and have them participate in steps two through six (below). The participants will enjoy the size of the group and you will improve PR across many groups as a dividend.
2. **Present Hard Data** — Provide three snapshots of your organization over the last 10 or 20 years to create a baseline understanding prior to planning (FY'84, '94, and '04; total budget, fund breadth and growth, donor demographics, staff size, administrative costs, etc.)
3. **Play Cards** — For steps three through seven, break into small groups of three or four by matching playing cards. Small groups are more effective because there are no side conversations, everyone gets to speak more often, and participant satisfaction with the process increases. For this step, identify successes, opportunities, challenges, and MLPs (Monster-Level Problems) and report this *soft data* back to the larger group through a designated leader.
4. **Identify Long-Term Destination and Job Description** — Break into new small groups and have each group identify a Vision (long-term, perfect destination for your organization five years down the road). Have all participants vote to select the best Vision. Repeat the exercise in new small groups to develop a Mission (Job description – What must we do to deliver the Vision?) Vote again to select the Mission.
5. **Prioritize Priorities** — Use the Vision and Mission in each small group to create five or six front-burner priorities to pursue over the next 18 months that will put your organization on course for the new destination (Vision). Vote on the top six as a large group.
6. **Set Goals** — Using the new priorities, brainstorm at least three goals for each. Vote again as a large group to select the highest-rated goal under each priority.
7. **Admire the Problem and Refine the Goal** — Following this large group brainstorming session, reconvene within the organization to identify all possible hurdles and to more accurately restate each new goal.
8. **Develop Action Steps** — Create four or fewer chronologic objectives to accomplish each new goal.
9. **Assign Accountability** — Agree on a deadline, resources needed, and one person responsible for each objective.



10. **Red Means Stop, Green Means Go** — Each participant in the final work plan holds 3 colored cards: red, yellow, green. Participants will hold up a card to indicate level of agreement with each piece of the plan (green = OK, yellow = caution, red = no go). This provides a quick check for any final revisions that may be necessary before proceeding with your new Vision.

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