



Inspiring Excellence
22nd Annual International Conference • July 29–August 1, 2009 • Boston, Massachusetts



**Session 308
Strategic Planning
Michel Hudson, CFRE**

The Resource for Fundraising Research, Analytics and Relationship Management




Agenda

- What Is Strategic Planning?
- Why Do It?
- What Does It Involve?
- How Do You Prepare?
- How Do You Measure Success?
- Benefits and Pitfalls
- Resources
- More Q&A

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What Is Strategic Planning?

- Not Annual Planning
- More than Long-range Planning
- Continuing Process

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APRA
Partners in Fundraising

Why Do Strategic Planning?

- Build on Strengths
- Overcome Weaknesses
- Determine Needs
- Commitment
- More Focused Approach

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What Does It Involve?

- Mission Statement
- Vision Statement
- Fact-finding
- Buy-in

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What Does It Involve?

- Retreat
- Follow-up
- Annual Reviews

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How Do You Prepare?

- Resources
- Timing
- Consultants
- Who to Include
- Steps to Take

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How Do You Measure Success?

- Reports
- Goals & Deadlines
- Review & Revise
- Evolve
- Okay to Be Unsuccessful

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Benefits and Pitfalls

- Lack of Buy-in
- Inability of Participants
- Out of Your Control
- Stability of Group

- Energizing
- Organized Framework
- Broader Set of Goals
- Proactive

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Resources

- *Bryson's Strategic Planning in Public and Nonprofit Organizations*
- Nolo.com
- NonprofitExpert.com
- ManagementHelp.org
- NEDRA News

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Q&A

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The Boston Square (Boston Chart)

High Risk Low Return	High Risk High Return
Low Risk High Return	Low Risk Low Return

- **High Risk, Low Return** - Avoid like the plague
- **Low Risk, High Return** - Everyone's a winner
- **High Risk, High Return** - May be worth doing - depending on how high the risk and how high the return. Needs careful consideration
- **Low Risk, Low Return** - why bother, a waste of time (*unless you are new to the area of work/activity and want to gain experience and practice with low risk and at low cost to you/the organization*)