Nonprofit Resilience Network
SOUTHCOAST COMMUNITY FOUNDATION

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Choosing the Right Planning Approach

STRATEGIC PLANNING FOR NONPROFITS:
FROM READINESS TO ACTION – SESSION 1

We help leaders make better decisions. | FIOPARTNERS.COM

WELCOME!

SouthCoast Community Foundation



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Introduce yourself in the chat!
Name, Org, Location

WELCOME!



Fio Partners, LLC

We help leaders make better decisions.

We work exclusively with:

- Nonprofits
- Foundations
- Collaboratives
- Government Agencies
- And their Boards

Our services include:

- Strategic Planning
- Strategic Alliances
- Leadership Advisory
- Executive Search
- Succession Planning
- Research & Evaluation
- Training (Staff & Board)

Our journey across four sessions

1

Choose

Choosing the Right Planning Approach

10.15.2026

2

Design

Designing an Informed, Inclusive, & Right-Sized Process

11.12.2026

3

Learn

Listening, Learning, and Engagement

12.03.2026

4

Act

Moving from Insights to Priorities to Action

01.07.2027



Session 1 Learning Objectives

Today, will help you:

1. Clarify what you hope a planning process will accomplish
2. Distinguish among strategic, implementation, annual, and scenario plans
3. Assess your organization's context, motivations, readiness, and capacity for planning
4. Reflect on lessons from prior planning efforts
5. Identify the first questions to discuss with board and staff leaders

You'll also leave with The Preparing to Plan Self-Assessment: a short tool to use with your board and staff leaders.



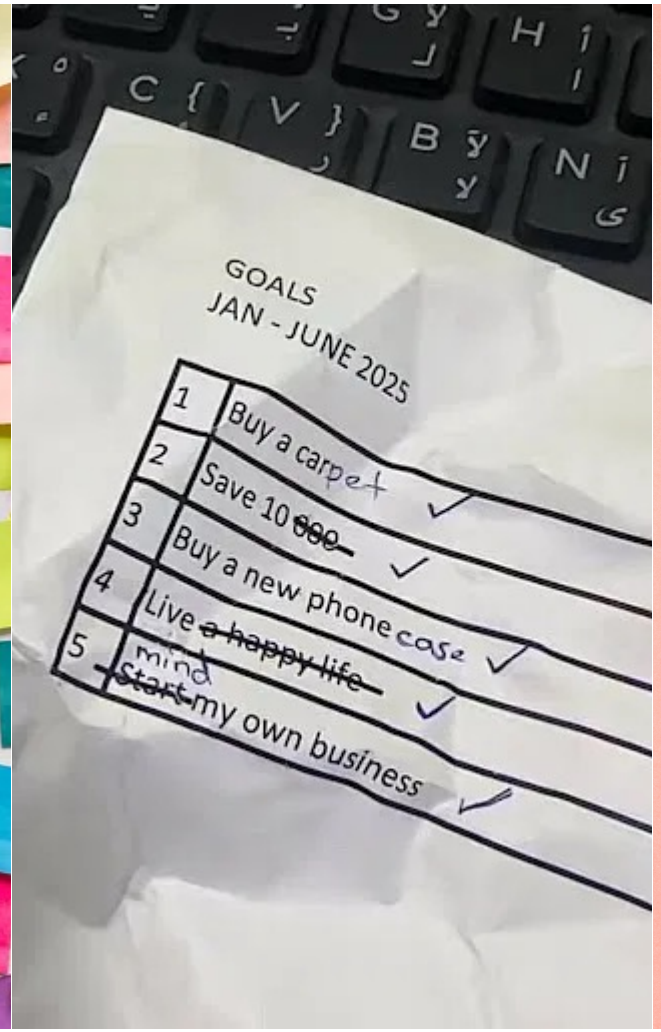
Poll: How did your last strategic planning process go?

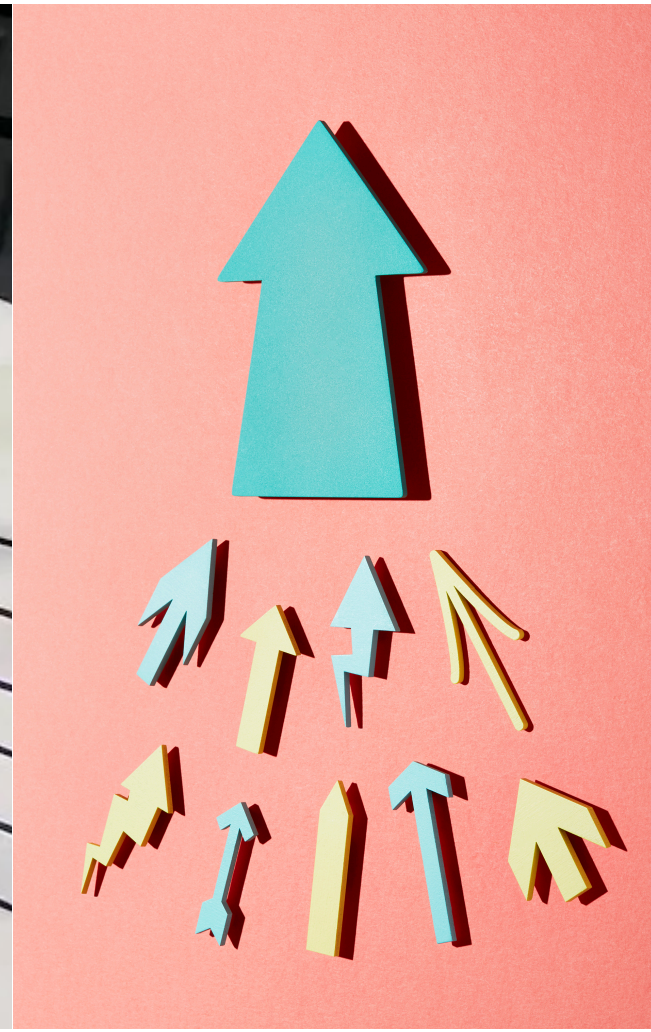
1. Great! I'm just here to frame up my thoughts for the next one.
2. Meh. It was ok but... (it wasn't realistic, we didn't implement it, etc.)
3. It was a disaster. I'm dreading doing it again.
4. This will be my first time!

What do you think of when you hear the term “strategic planning”?











What is a strategic plan?

A strategic plan is a document that

- Identifies a nonprofit's intended **impact**, and the **priorities and actions** needed in the coming years to achieve it.
- Serves as a **roadmap** that creates **shared understanding** and helps leaders **make choices** and **allocate resources.**
- Is really a **change agenda!**

Organizations typically create/update their strategic plans every 3-5 years.



Why plan?

Planning creates opportunities to

1. **Step away** from the day-to-day to ponder new possibilities and address current challenges
2. **Reaffirm** why your organization exists and the impact it wants to have
3. **Hear a range of perspectives** on how the organization is doing and changes in its environment
4. **Identify** how programs, relationships, and resources can evolve to better achieve the mission
5. **Engage** staff and Board members in designing the organization's future



Trends we are seeing

Intentionality

- Engaging people beyond the Board and ED (staff, clients, volunteers, stakeholders)
- Connecting intended impact, partnerships, and business model
- Integrating planning with other major organizational initiatives (culture, equity, rebranding, campaigns)

Tension

- Around planning during a time when everything feels uncertain
- Around what kind of planning is really needed and when
- Around finding the capacity (and funding) for planning on top of everything else

Two fictional organizations we'll follow



Local Community Arts

- Community arts organization with 2 staff (ED + part-time program coordinator)
- Heavily grant funded with some patrons
- Relies on volunteers and a working board
- Stable, beloved, and stretched thin
- Last strategic plan is six years old
- *"How do we focus and build capacity?"*



Regional Human Services

- $15M multi-program, multi-site, ~80 staff
- Complex public and private funding streams
- Rapidly changing policy and funding environment
- New executive director in year one looking to set vision and strategy
- *"How should we evolve over the next 5 years?"*



Do we even need a strategic plan?

(Really?)

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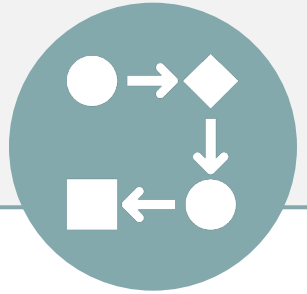
What type of plan do you need?

Do you clearly understand what you're working toward and why? *Rooted in recent information and insights? Written down and shareable?*	**Strategic Plan**
Have you outlined the key activities that support your priorities?	**Implementation Plan**
Do you need to prioritize and assign activities for the next year?	**Annual Plan**
Is there uncertainty around potential external changes that would affect your organization significantly?	**Scenario or Contingency Plan**

What type of plan do you need?

Sets multi-year direction: vision, mission, values; strategic goals and supporting strategies; informed by fresh learning	**Strategic Plan**
Outlines the key activities that support the strategic priorities; multi-year plans may be organized in phases	**Implementation Plan**
Details the specific actions for a given year, resources needed, target timing, and key performance indicators / measures	**Annual Plan**
Prepares the organization to respond to uncertainty by exploring possible futures and decision triggers	**Scenario or Contingency Plan**

Scenario or Contingency Planning



Scenario planning is a **structured process** for naming conditions in flux, how they might affect your organization, and how you could respond.

1. Orient the Group
2. Identify Conditions in Flux
3. Map Selected Conditions
4. Imagine Emergent Futures
5. Develop Response Strategies



Context also shapes what is needed

- Organizational instability (financial, leadership)
- Degree of urgency
- Prioritization vs. Strategy
- Compliance vs. Curiosity
- Improvement vs. Transformation

“More” is not always best.

Define “better.”

Context also shapes what is needed

Context	Local Community Arts	Regional Human Services
Instability	Low; finances thin but stable	Moderate; leadership transition
Urgency	Moderate; volunteer burnout	High; funding and policy shifts
Prioritization vs. strategy	Prioritization	Strategy
Compliance vs. curiosity	A funder asked for a plan	New ED and Board are curious
Improvement vs. transformation	Improvement	Potential transformation
Challenges	Funding mix, capacity, focus	Siloed, bureaucratic, listening
Strengths	Strong values, regular listening	Capacity/resources, curiosity

Before you plan, ask yourself:

What are you worried about? What opportunities do you see?

What do people (staff, board, funders, etc.) need to understand?

What do you need the plan to do?

What does your team have the capacity to do?

What is sufficient?

REUSE



Does your organization have a clear need or motivation for taking on strategic planning?

UNMUTE OR USE THE CHAT TO SHARE!

Look back before you look ahead

- When was the last plan completed?
- How was that process received by the board, staff, and community?
- How was the prior plan used to support the organization?
- What was accomplished? What was left undone? Why?
- What did you like about your last planning process? What would you do differently?
- What critical issues and opportunities should this process address?

Local Community Arts

Its last plan had 22 initiatives. Most were never tracked.

Regional Human Services

Its plan was board-driven. Staff barely knew it existed.

What is thoughtful and sufficient?



Local Community Arts

Shorter, focused improvement

Check-in on evolving needs and focus its priorities & resources

3 months



Regional Human Services

Large-scale, transformative

Deep listening and alignment, culture and business evolution

9 months

Be honest about capacity



Leadership & Time

- How much time can board and senior staff commit?
- Which committees would naturally lead the effort?



Involvement

- How do you want to engage staff and people impacted by your work?



Information

- What do you already know?
- What do you need to learn?



Money & Logistics

- Budget range?
- Target completion date and what's driving it?
- Who coordinates?



Start the conversation with your leaders

- Why are we considering planning now?
- What do we need this plan to accomplish?
- What did we learn from our last plan and process?
- What kind of plan fits our context?
- What can we realistically commit?



Tool: Preparing to Plan Self-Assessment

1. **Why now?**
   Planning triggers
2. **Looking back**
   Lessons from past plans
3. **What do we need?**
   Type of planning challenge
4. **Readiness snapshot**
   Capacity and alignment
5. **Next conversations**
   with your board and staff leaders

Complete it on your own, then compare answers with your board chair and senior staff.

Where you differ is often where the most useful conversation begins.



Key Takeaways

- Start with purpose: What do you need the plan to do?
- Get clear about your context and motivation, then match the type and scope of planning to it.
- Learn from your last plan before starting the next one.
- Right-sized means thoughtful and sufficient—
  More isn't always best. Define better!

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Thank you!



Unmute & let's talk!

1. Which type of planning seems most aligned with your needs? Why?
2. What lessons from a past planning effort will you carry forward?
3. Where does your organization feel most ready? Least ready?