



STRATEGIC PLAN REVIVAL: FROM IGNORED TO IMPLEMENTED



BROUGHT TO YOU BY:

TPG The Pivotal Group



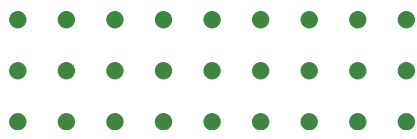
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INTRODUCTION

Welcome to "The Nonprofit Success Plan"—your ultimate strategic planning toolkit designed to guide nonprofit leaders like you through the process of creating and implementing a successful strategy. This document includes everything you need to get started: from assessing your current state to setting goals and gaining board support. By following this step-by-step guide, you'll align your team and board with a common vision for the future and set your organization on the path to long-term success.



CURRENT STATE ASSESSMENT

Before you can plan for the future, it's essential to understand where you currently stand. Answer the following questions to assess your organization's current state.

FRUSTRATIONS:

What are your current revenue streams?
Are there any significant gaps or opportunities for growth in revenue generation?

INCOME/ REVENUE:

What are your current revenue streams?
Are there any significant gaps or opportunities for growth in revenue generation?

AUDIENCE SIZE:

Where can we get more information?
Where can we source assistance from?
Where is the greatest need for the change?

IMPACT:

Why is this relevant to us?
Why is there a need for change?
Why is this a problem requiring change?

SUPPORT:

When would this benefit society?
When is the time to take action?
When will we know it has been a success?



FUTURE VISION (3-5 YEARS)

Create a vision for where you want your organization to be in the next 3-5 years. Answer the following questions:

INCOME GOAL

What is your desired revenue target?

AUDIENCE GROWTH:

How much do you want to expand your reach?

IMPACT:

What impact do you aim to have on your community or target audience?

LEADERSHIP DEVELOPMENT:

How will you build a leadership pipeline?

SUPPORT STRUCTURES:

What additional support structures (funding, partnerships, etc.) do you need to put in place?



STRATEGIC OBJECTIVES & KEY RESULTS

Define specific, measurable objectives that will drive your nonprofit's success over the next year.

Revenue Growth:

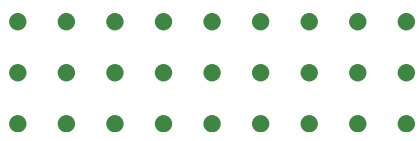
Define how much revenue growth is necessary to sustain operations.

Market Positioning:

What steps can you take to increase your visibility and credibility within the sector?

Operational Excellence:

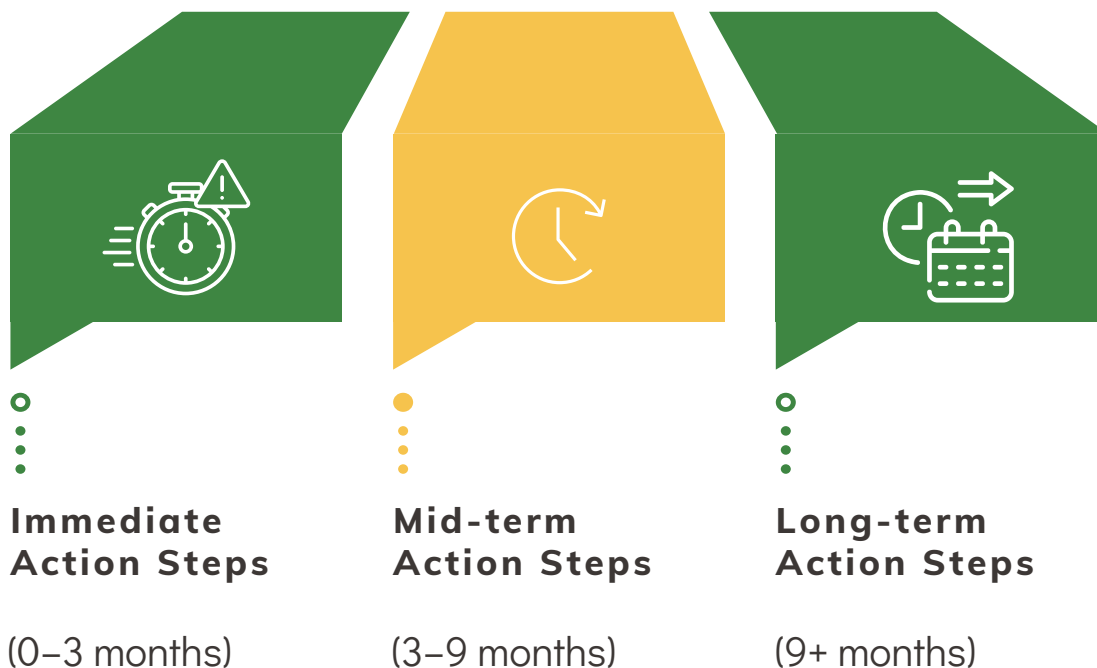
What operational improvements will make your organization more efficient and impactful?



ACTIONABLE INSIGHTS & KEY METRICS

Action Steps:

Break your objectives down into actionable steps:



Key Metrics:

Define metrics to track your organization's progress toward strategic goals:

- Revenue: Monthly and quarterly revenue goals
- Audience Engagement: Website traffic, social media followers, event attendance
- Impact: Surveys, feedback forms, community testimonials



PERSONAL & ORGANIZATIONAL DEVELOPMENT



LEADERSHIP DEVELOPMENT:

- Focus on building leadership skills within your team.
- Develop a leadership development plan that aligns with your strategic goals.



STRATEGIC THINKING:

- Incorporate regular strategic thinking sessions into your team's work culture.



COMMUNITY ENGAGEMENT:

- Strengthen relationships with key stakeholders: donors, volunteers, and community partners.



PERSONAL & ORGANIZATIONAL DEVELOPMENT

Securing board support is crucial for strategic planning success. Here's how you can involve your board in the process:

Start with Clear Communication:	<ul style="list-style-type: none">• Explain the importance of the strategic plan and how it will benefit the organization.• Share data and case studies that illustrate the value of strategic planning.
Align with Board Goals:	<ul style="list-style-type: none">• Show how the strategic plan ties into the organization's mission and vision.• Emphasize the plan's link to financial stability and growth.
Involve Board Members Early:	<ul style="list-style-type: none">• Hold a kickoff workshop with the board to gather input on strategic goals.• Regularly update the board on progress and milestones.
Set Clear Expectations:	<ul style="list-style-type: none">• Assign specific roles and responsibilities to board members in the planning process.
Create Accountability:	<ul style="list-style-type: none">• Set clear, measurable goals for board members to track.• Provide progress reports and celebrate achievements.
Address Concerns:	<ul style="list-style-type: none">• Listen to board feedback and address concerns to maintain engagement.

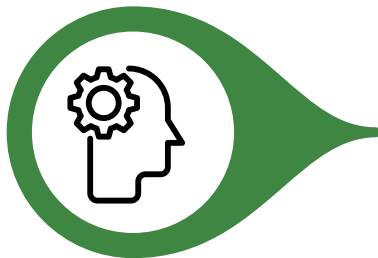


REVIEW & REFLECTION



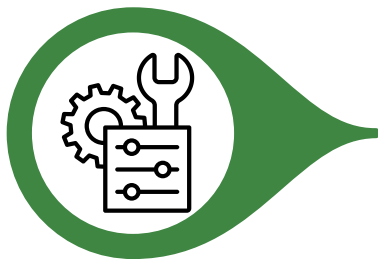
Quarterly Review:

Hold quarterly strategy reviews to assess progress and adjust the plan as needed.



Reflection

Use feedback from staff, board members, and stakeholders to refine your approach.



Adjustments & Adaptations:

Regularly revisit your strategy and update it in response to internal and external changes.



DOWNLOADABLE TEMPLATES & WORKSHEETS



Strategic Plan Template:

A fillable template that guides you through each section of the strategic plan.



Board Engagement Worksheet:

A worksheet that helps you plan board member roles and track their involvement.



Action Step Tracker:

A tool to break down your strategic objectives into actionable steps and track progress.



Impact Measurement Worksheet:

A form to track your organization's progress on impact-related goals.



Financial Planning Template:

A budgeting and revenue tracking template to align your financial goals with your strategy.



CHECKLIST FOR SUCCESS

To ensure that you've covered all the critical aspects of your strategic planning process, use the following checklist:

Completed a Current State Assessment	<input type="checkbox"/>
Defined a clear and inspiring 3–5 year Future Vision	<input type="checkbox"/>
Set clear Strategic Objectives with measurable key results	<input type="checkbox"/>
Established Actionable Insights with timelines	<input type="checkbox"/>
Developed a plan for Personal and Organizational Development	<input type="checkbox"/>
Built a strategy to gain Board support and involvement	<input type="checkbox"/>
Implemented a system for regular Review & Reflection	<input type="checkbox"/>
Downloaded and utilized the Templates & Worksheets provided	<input type="checkbox"/>
Created an ongoing system for tracking and adapting your strategy	<input type="checkbox"/>



FINAL THOUGHTS:

This toolkit is designed to guide you step-by-step through the strategic planning process, ensuring that your organization is not only prepared for success but positioned to thrive. Remember, a strong strategy isn't static—it's dynamic. As your organization grows, so too should your strategy.

If you need further support or would like a consultation to guide your strategic planning process, feel free to reach out to us!

Below are the **printable templates and worksheets** for your **Nonprofit Success Plan** that will be easy to download, print, and fill out. They can be used as tools to help organizations create their strategic plan, engage their board, break down objectives, measure impact, and track financial planning.





STRATEGIC PLAN TEMPLATE

Purpose: This template will guide you through each section of the strategic plan and help you break down goals into actionable steps.

Section 1: Current State Assessment

Challenges/Frustrations:

- What are the main barriers your organization is facing?

Revenue:

- What are your current revenue streams?

Audience Size:

- How many people or groups are you currently serving?

Impact:

- How many people or groups are you currently serving?

Support:

- How many people or groups are you currently serving?



Section 2: Future Vision (3-5 years)

Income Goal:

- What is your desired income in 3-5 years?

Audience Growth:

- How much do you want to grow your audience in this timeframe?

Impact:

- How many people or groups are you currently serving?

Leadership Development:

- How will you develop future leaders?



Section 3: Strategic Objectives & Key Results

- **Objective #1:**

- **Key Results:**

- **Objective #2:**

- **Key Results:**

- **Objective #3:**

- **Key Results:**



Section 4: Actionable Insights & Key Metrics

Action Steps:

- Immediate (0-3 months):

- Mid-Term (3-9 months):

- Long-Term (9+ months):

Key Metrics



BOARD ENGAGEMENT WORKSHEET

Purpose: This worksheet helps you plan board member roles and track their involvement in the strategic planning process.

Board Members & Roles:

Board Member Role	Primary Responsibility	Areas of Involvement in Strategic Plan	Commitment Level

Board Involvement Checklist

(For use at different phases of strategic planning)

Participate in the strategic planning workshop (Date: _____)	<input type="checkbox"/>
Review and approve the draft plan (Date: _____)	<input type="checkbox"/>
Monitor quarterly progress reports (Ongoing)	<input type="checkbox"/>
Help secure resources and funding (Ongoing)	<input type="checkbox"/>
Provide feedback on strategy (Date: _____)	<input type="checkbox"/>



Board Feedback Tracker

Date	Board Member	Feedback/Comments	Action Taken



ACTION STEP TRACKER

Purpose: A tool to break down your strategic objectives into actionable steps and track progress.

Board Members & Roles:

Objective: _____

Action Step	Responsible Person	Deadline	Status	Progress Notes

Key Metrics:

◦ Key Metrics 1: _____

◦ Key Metrics 2: _____

◦ Key Metrics 3: _____



IMPACT MEASUREMENT WORKSHEET

Purpose: A form to track your organization's progress on impact-related goals.

Impact Area 1: [Area Name]

Key Metric	Target	Current Status	Date Measured	Notes

Impact Area 2: [Area Name]

Key Metric	Target	Current Status	Date Measured	Notes



FINANCIAL PLANNING TEMPLATE

Purpose: A budgeting and revenue tracking template to align your financial goals with your strategy.

Annual Budget Overview

Category	Projected Amount	Actual Amount	Variance
Revenue			
Program Expenses			
Administrative Costs			
Fundraising Expenses			
Salaries/Compensation			
Other (Specify)			

Category	Projected Amount	Actual Amount	Variance
Donations			
Grants			
Earned Income			
Special Events			
Other (Specify)			

Download & Use Instructions

1. **Download:** Click to download the fillable templates in PDF format.
2. **Print:** Print the worksheets, and fill them out as you go.
3. **Use:** Refer to these templates regularly to keep track of your progress.

These templates will help your nonprofit stay organized, hold board members accountable, and ensure that you track all critical aspects of your strategic plan effectively. Let me know if you'd like them formatted in a specific way or if you need additional materials!



FINANCIAL PLANNING TEMPLATE

Purpose: A budgeting and revenue tracking template to align your financial goals with your strategy.

Annual Budget Overview

Key Metric	Target	Current Status	Date Measured	Notes

Impact Area 2: [Area Name]

Key Metric	Target	Current Status	Date Measured	Notes

CONTACT US!



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