

 **Nonprofit Webinars**

From Strategy to Action

Effective Planning for Nonprofits

August 11, 2010

Sam Frank
Synthesis Partnership

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SYNTHESIS
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Take-aways

- A framework for planning
- The real value of a mission statement
- How to create an action plan that will work
- What to share with whom, and how

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SYNTHESIS
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Integrated Planning

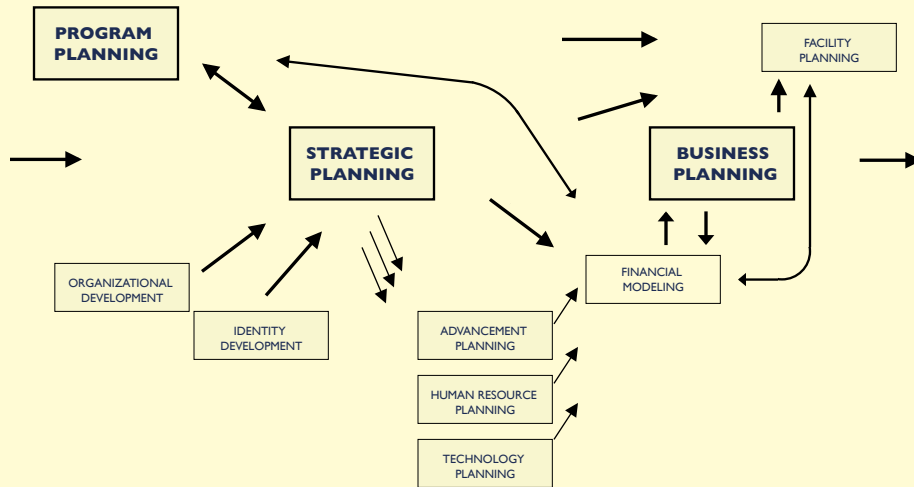


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The Planning Cycle



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Why Plan?

Circumstance

Operations

Wisdom

Cultivation

Organizational Development

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Strategic Planning Process

Prepare

Assess

Engage

Plan

Implement

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Strategic Planning:

4. Plan

Mission

Mission-Based Goals

Supporting Objectives

Measurable Actions

- Clear, specific action
- Measurable result
- Timeline (start and completion dates)
- Resources required
- Responsibility

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Strategic Planning:

4. Plan

Mission & Mission Statement

Mission Statement

Moses Brown, a Friends school, exists to inspire the inner promise of each student and instill the utmost care for learning, people, and place.

Our Philosophy

Moses Brown
nourished. We
students reach

Our values di
students' grow
own sake, resc

Moses Brown

Friends Educa
within a stimu
arts and athlet
integrity, com

I'm Too Young For This! Cancer Foundation

Our mission is to

end isolation and improve quality of life for young adults affected by cancer.

We do this by:

- serving as a global support and social network
- educating providers
- advocating on behalf of young adults

movement and drive change.

- gaining a better understanding of the needs of young adult survivors.

- using music and the arts to connect and unite young adults, build community and make it hip to talk openly about their experiences.

The mission of Invent Now (the National Inventors Hall of Fame) is to **celebrate and foster the spirit and practice of invention — the innate human impulse that drives social and economic progress.**

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Strategic Planning:

4. Plan

Mission & Strategy

Mission To transform the way buildings and communities are designed, built and operated, enabling an environmentally and socially responsible, healthy, and prosperous environment that improves the quality of life.

Mission elements

buildings and communities

transform

- designed
- built
- operated

enabling an environment

- environmentally & socially responsible
- healthy
- prosperous

improves quality of life

Committees/Functions

Programs

- Advocacy
- Conference
- Outreach
- Professional Education

Infrastructure

- Communications / Marketing
- Finance
- Fundraising
- Membership
- Governance
- Operations

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Strategic Planning:

4. Plan

Goals & Objectives

CBE

Mission-Based Goal: Membership

Strengthen ties & the sense of community among all members.

Supporting Objective 1:

Develop programs that appeal to every segment of the CBE community.

Supporting Objective 2:

Connect with new members through as many means as possible.

Supporting Objective 4:

Reach out to members only partially engaged in the CBE community.

Supporting Objective 8:

Cultivate all younger members as potential leaders.

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Strategic Planning:

4. Plan

Goals & Objectives

CBE

Mission-Based Goal: Finance

CBE will operate in a fiscally responsible manner.

CBE has not made a compelling case for the appropriateness of its current spending or its need for a higher level of funding. More transparency is needed to indicate where funds are going and how thinly they are stretched. For financial sustainability CBE needs to look at retaining existing members and increasing membership.

Supporting Objective 1:

Communicate the financial facts more clearly to the membership.

Supporting Objective 2:

Identify opportunities for revenue enhancement to support expansion of programming and services.

Supporting Objective 3:

Make prudent choices about programs that can be supported.

Supporting Objective 4:

Build understanding about the need to enhance the endowment.

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Strategic Planning:

Public Plan

4. Plan

SGIS

Dedication to Excellence

Goal 1

SGIS will operate as a single school in pursuit of its mission.

To preserve SGIS's unique culture and to ensure that the school stays true to its mission and provides consistent quality and efficiency in the delivery of that mission, the school must operate as a single entity with a focus on understanding the value of inter-relatedness and diversity in providing a rich learning environment for students.

Objective 1

Ensure that learning experiences across all campuses are student-centered and prepare students for a diverse global world by providing the opportunity for authentic discovery of ideas and skills in order to foster a love of learning.

The student experience – whether in the classroom or in an after-school or summer program – is at the core of an SGIS education. Through goal-setting, reflection, and teacher comments, students at all levels will be guided to an understanding of the learning process and a love of learning for learning's sake.

Objective 2

Develop an understanding among the SGIS community of the value of excellence in education created by the SGIS model.

The SGIS model is not just an added value of the school, it is an essential feature of

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Strategic Planning:

Two versions

4. Plan

SGIS

Dedication to Excellence

Goal 1

SGIS will operate as a single school in pursuit of its mission.

Objective 2

Develop an understanding among the SGIS community of the value of excellence in education created by the SGIS model.

The three-campus model is not just an added value of SGIS, it is an essential feature of the SGIS education and experience, both for students and for their families. This fact must be reflected in curriculum, communications, family events, and all other school functions. SGIS will have to re-examine curriculum, communications, and events annually to assure that the school is reflecting this commitment in them in the best possible manner.

Action 1:

Annually review the curriculum to assure that it supports the understanding and acceptance of all SGIS students.

Action 2:

Communicate to all constituent groups the vision and progress of cross-campus connections at least three times a year.

Action 3:

Parents Association will plan events, times and location to be supportive of all three campuses.

Action 4:

Have at least one school-wide event for families and faculty from all 3 campuses each year.

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Strategic Planning: Action Plan

4. Plan
WS

Goal 3:

Develop a framework for governance in accordance with principles of good practice

Objective 2: Formalize board development practices

ACTION	MEASURABLE RESULT
1 Establish and maintain a composite profile of trustees	Annual report to board
2 Identify prospects with needed skills; recruit them for committees	Annual report to board
3 Develop an effective board orientation process	Documented process in trustee handbook
4 Devote time at board meetings to board education	Agenda item for every meeting
5 Assure that all trustees partake of external learning opportunities	Each trustee attends 1 session per year
6 Groom future leadership through committee work	Annual report to board
7 Review committee structure for effectiveness	Revised committee structure if needed

BEGIN	COMPLETE	RESOURCES REQUIRED	RESPONSIBILITY
1 3/08	6/08; ongoing	Time, thought	Committee on Trustees
2 3/08	3/09; on-going	Time, contacts	All trustees / Committee on Trustees
3 6/08	4/09	Time, thought	Committee on Trustees
4 9/08	On-going	Time, thought	Board Chair / Committee on Trustees
5 9/08	On-going	Information about opportunities	Board Chair / Head
6 1/09	On-going	None	Board Chair / Committee on Trustees
7 3/08	5/08	Time, thought	Committee on Trustees

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Strategic Planning:

5. Implement

Action items absorbed into job descriptions

Ongoing renewal of action items

Monitoring and reporting: Actions and metrics

Repeat

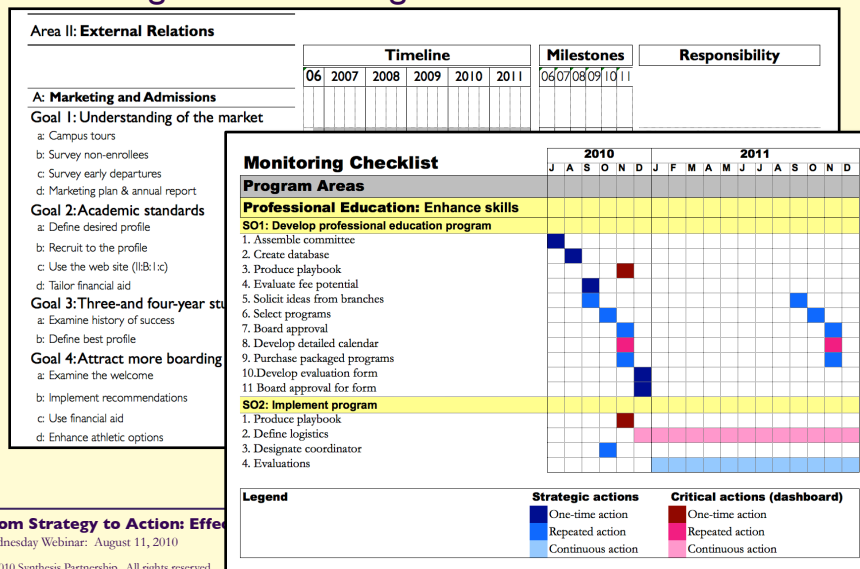
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Strategic Planning: Plan tracking and monitoring

5. Implement

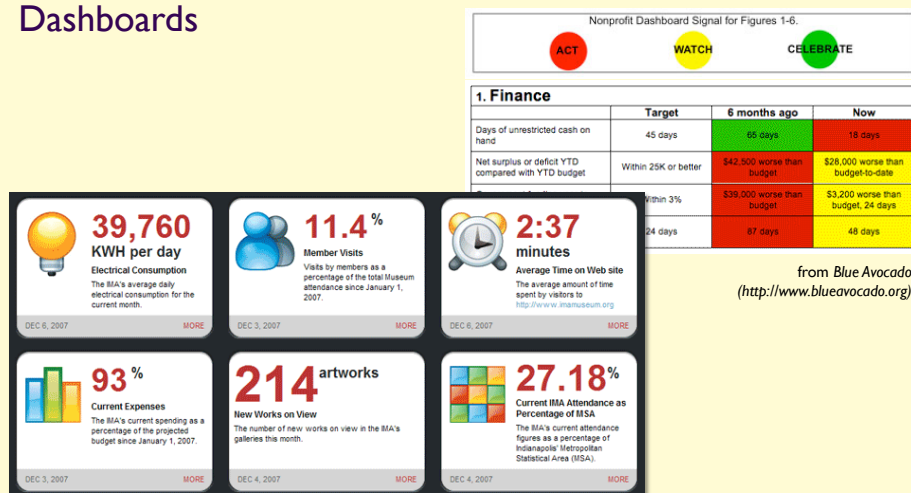


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Strategic Planning: Dashboards

5. Implement



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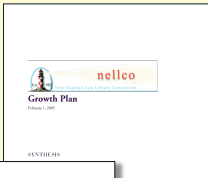
Strategic Planning:

5. Implement

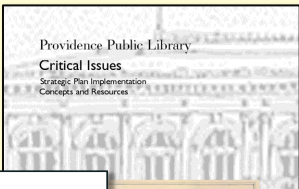
Published Plans



MOSES BROWN SCHOOL
STRATEGIC PLAN 2007-2011 GOALS & OBJECTIVES



nelco
Growth Plan



Providence Public Library
Critical Issues
Strategic Plan Implementation
Concepts and Resources

Inspiring Inner Promise
The Moses Brown School Strategic Plan
Goals and Objectives

Plan produced by the Long Range Strategic Planning Task Force
Approved by the Board of Overseers, April 2008

Letter from the Head of School and Chair of the Board of Overseers
Letter from the Chair of the Long Range Strategic Planning Task Force
Long Range Strategic Planning Task Force
Revising MBS Mission Statement
Mission Philosophy and Core Practices
A Promise for
Moses Brown's Educational Program
Relationships
Enrollment
Facilities
Development
Moving Forward: the Ad Hoc Subcommittee on Strategic Planning
Moses Brown School Board of Overseers, 2008-2009
The Strategic Planning Process Committee Members

"Moses Brown does a wonderful job of encouraging students to take themselves seriously as thinkers, story tellers, and individuals."

—Jill Albrecht

EDUCATIONAL PROGRAM PLANNING GROUP

Chair: Louise Gies, executive director

Jill Albrecht
Jan English
Katherine Hagedorn
Joanna Harkness
Paul Lindemann
Jeff Matheson
Johnna Newman
Dana Ovi
Tara Perreault-McCabe
Sara Richter
Dan Smith
Shirley Swisher
George Tardif
Linda Wood

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A PROMISE FOR MOSES BROWN

EDUCATIONAL

OUR GOAL

Offer an educational program that inspires, enriches, and challenges our students.

What must we do to get there?

OUR OBJECTIVES

1. Foster development and nurture a growth mindset that promotes lifelong learning.
2. Ensure the highest quality of teaching practices.

Expand faculty training in new areas for new teachers, and support veteran teachers and staff.

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"To further develop a culture of philanthropy at Moses Brown School, the tradition of giving should be cultivated before graduation. MB has given us so much...and it is essential that all of us give back."

— Bill Fuchs, chairman, parent and board member

A PROMISE FOR DEVELOPMENT

OUR GOAL

Ensure Moses Brown School's ability to achieve its mission by ensuring resources for the operating and capital budgets, as well as endowment.

Advancing Moses Brown's mission is dependent on a financial balance that allows the school's ability to thrive in the present and reach for the future. As such, fundraising should be viewed as essential to financial sustainability and the appropriate commitment must be made to achieve fundraising success.

What must we do to get there?

OUR OBJECTIVES

1. Inspire and foster a culture of commitment to the stewardship of Moses Brown and all of its resources.

A commitment to sustainability — indeed, to an institutional culture of philanthropy — must be a priority. We will continue to develop the emotional commitment of our constituents through engagement, which will provide inspiration for giving.

Chair: Ted Foster

Russ Carpenter
Stephanie Ogden Prosser

Administrative advisor:
Lynn Frost, director of development & alumni relations

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Resources

Critical Issues

- #1: *Why Plan?*
- #2: *The Secret Life of Surveys*
- #5: *The Structure of Planning*

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<http://bit.ly/Sypci02>
<http://bit.ly/SyPci05>

Blog

(entries on planning)

<http://bit.ly/SyPblog>

Other Webinars on Planning

current listings & registration at
schedule overview & registration link at

<http://www.nonprofitwebinars.com>
<http://bit.ly/SyPwebinars>

- *Integrated Planning*
- *Strategic Planning as Organizational Development*
- *Cultivating Stakeholders*
- *Reduce Costs and Risks in Facility Planning*

Complimentary consultation

(by e-mail or telephone appointment)

sbf@synthesispartnership.com