

Achieving Your Vision: Implementing the Strategic Plan



Sponsored by the Department of Hawaiian Home Lands



Hawai`i Alliance of Nonprofit Organizations

For more than a century, the Hawai`i Alliance for Nonprofit Organizations, formerly the Hawaii Community Services Council, has worked to improve our community, leading systemic change and helping nonprofits become more efficient and effective.

What We Do

HANO is a statewide alliance that advances the common interests of Hawai'i nonprofits through advocacy, training, professional development, propagating successful practices, and by speaking with a strong, single voice on behalf of its members and their communities.



Help Us Get To Know You

Please introduce yourself:

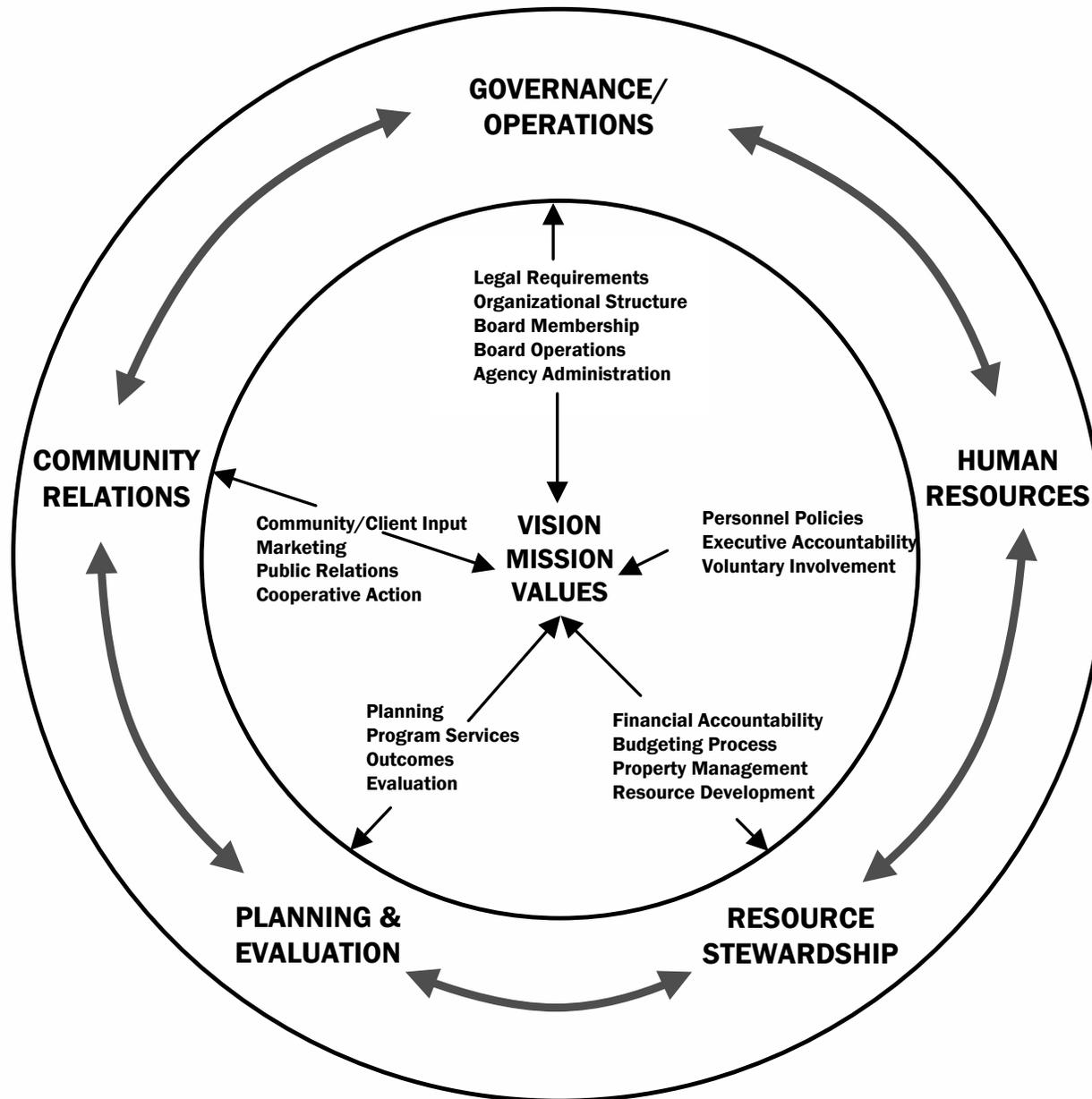
- Your Name
- Your Organization
- Your Experience with Nonprofit Boards, if any
- What your Expectations for today are



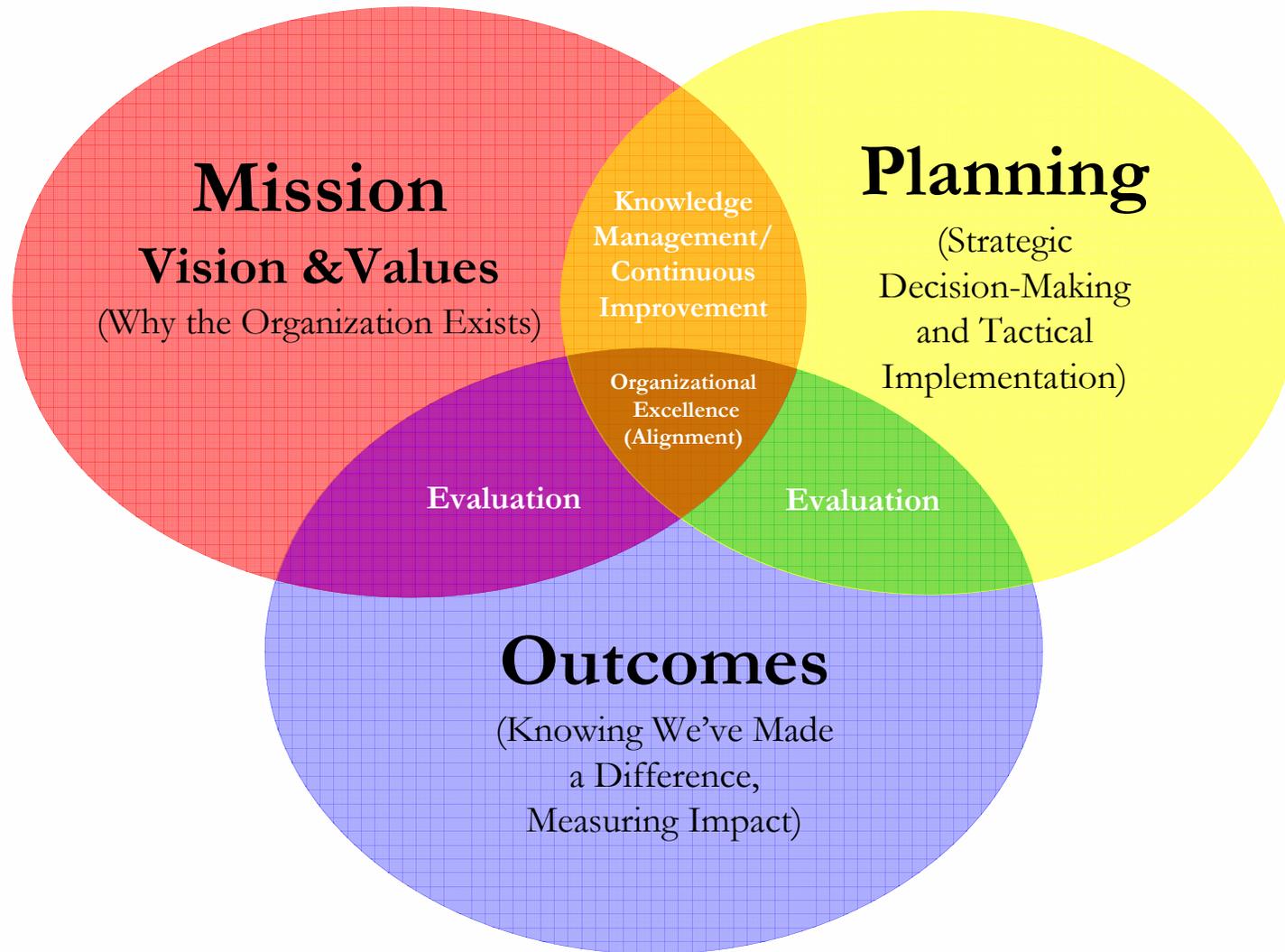
Our Expectations for Today

- That you **become familiar** with some of the **best practices** in implementing strategic plans.
- That you leave here with some **tools to** help you be a **more effective** board or staff member.
- Additionally, we expect that you will **be courteous to others** during the workshop and **put your cell phones on silent mode**. If you need to **answer a call**, please go **outside the training room** to do so.

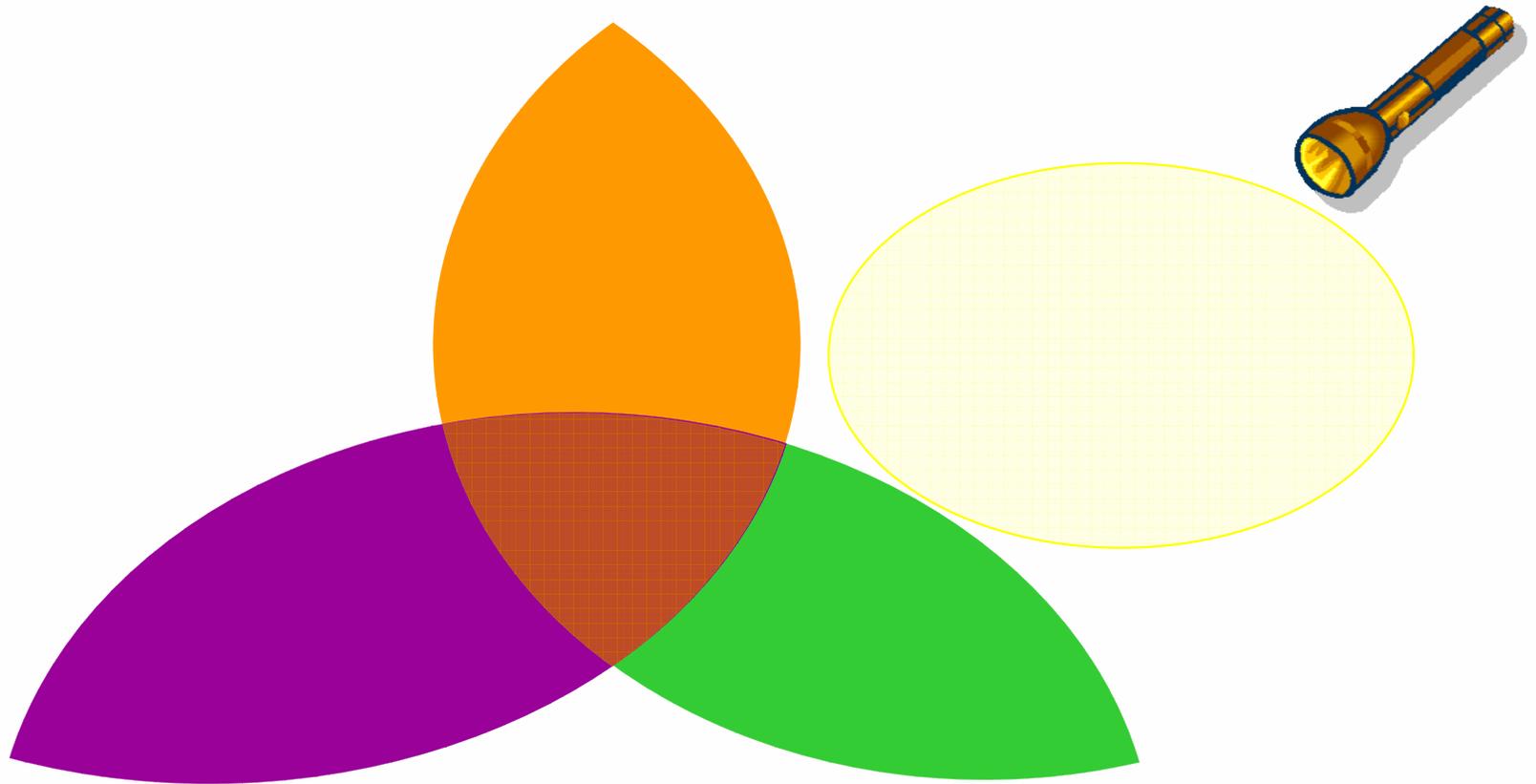
POLICY AREAS: The Big Picture



How Mission Planning & Outcomes Are Related



Planning





Planning – What a Concept!

- What is the purpose of planning?
- What kinds of planning activities does your organization engage in?
- What goes well during your planning activities?
- What kinds of challenges do you face in your planning activities?



Types of Planning

- Strategic Planning
- Operational Planning (Action Planning, Tactical Planning or Work Plan)
- Program-Level Planning
- Business Planning
- Long-Range Planning
- Scenario Planning
- Succession Planning
- Disaster Preparedness Planning (Disaster Recovery, Business Continuity)



Board's Role in Planning

1. Program Planning and Budgeting
2. Evaluation of Organizational Effectiveness



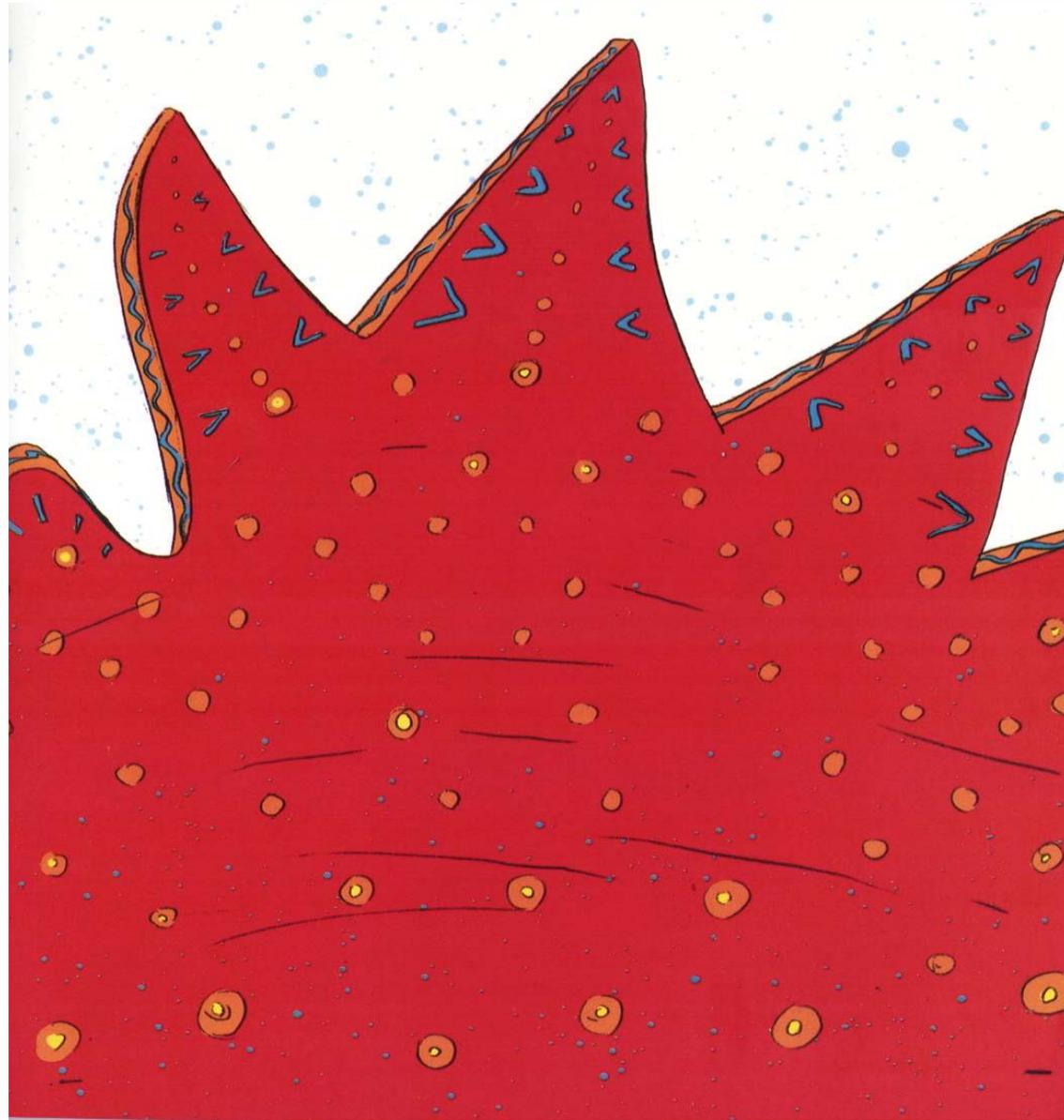
Focusing on Strategic Planning

- How many of your organizations have engaged in strategic planning?
- What do we want our strategic plan to do for us?
- What makes it a worthwhile investment of our resources?
- What resulted from the strategic plan?

Excerpted from

ZOOM

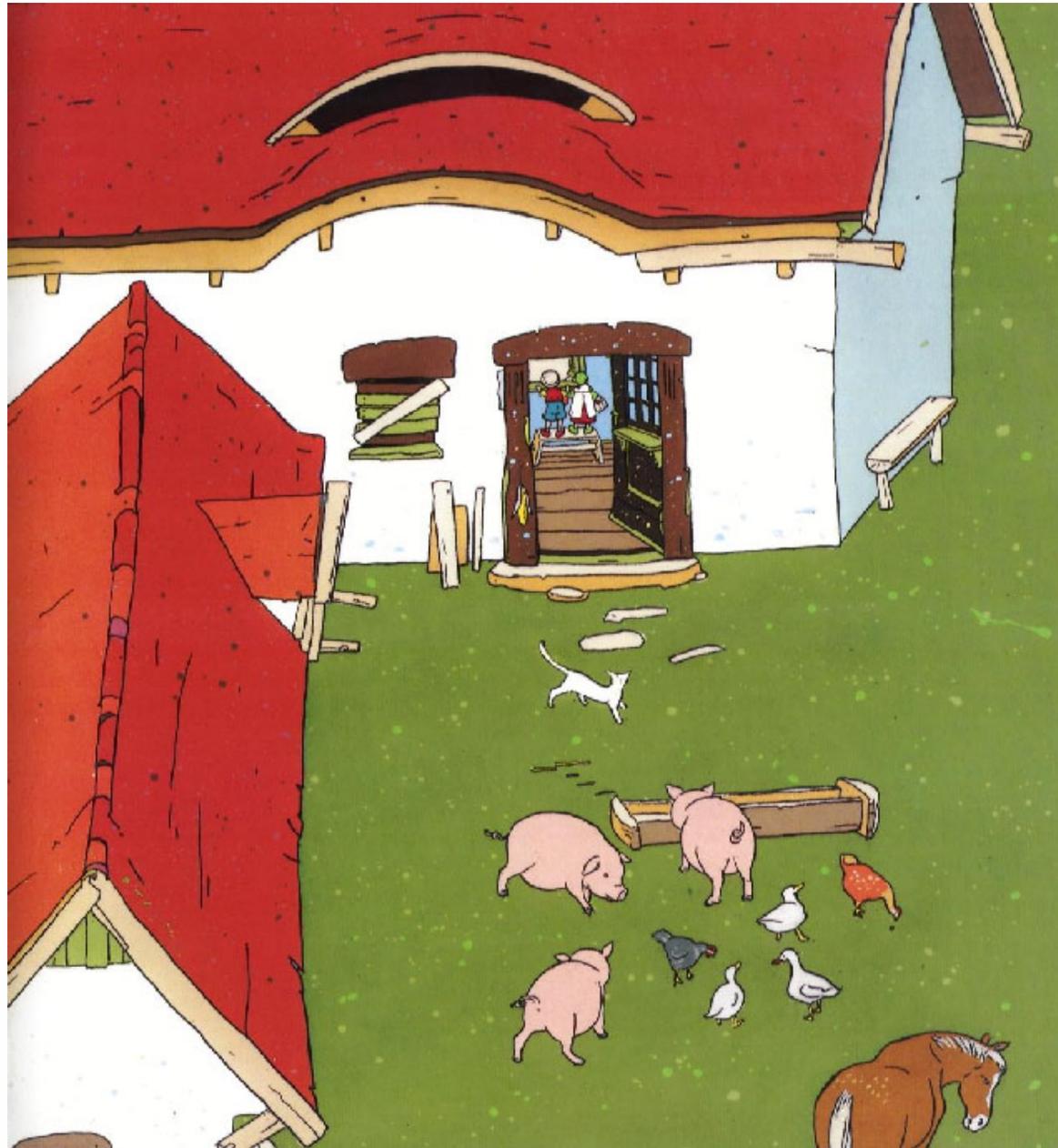
A book written and illustrated by
ISTVAN BANYAI







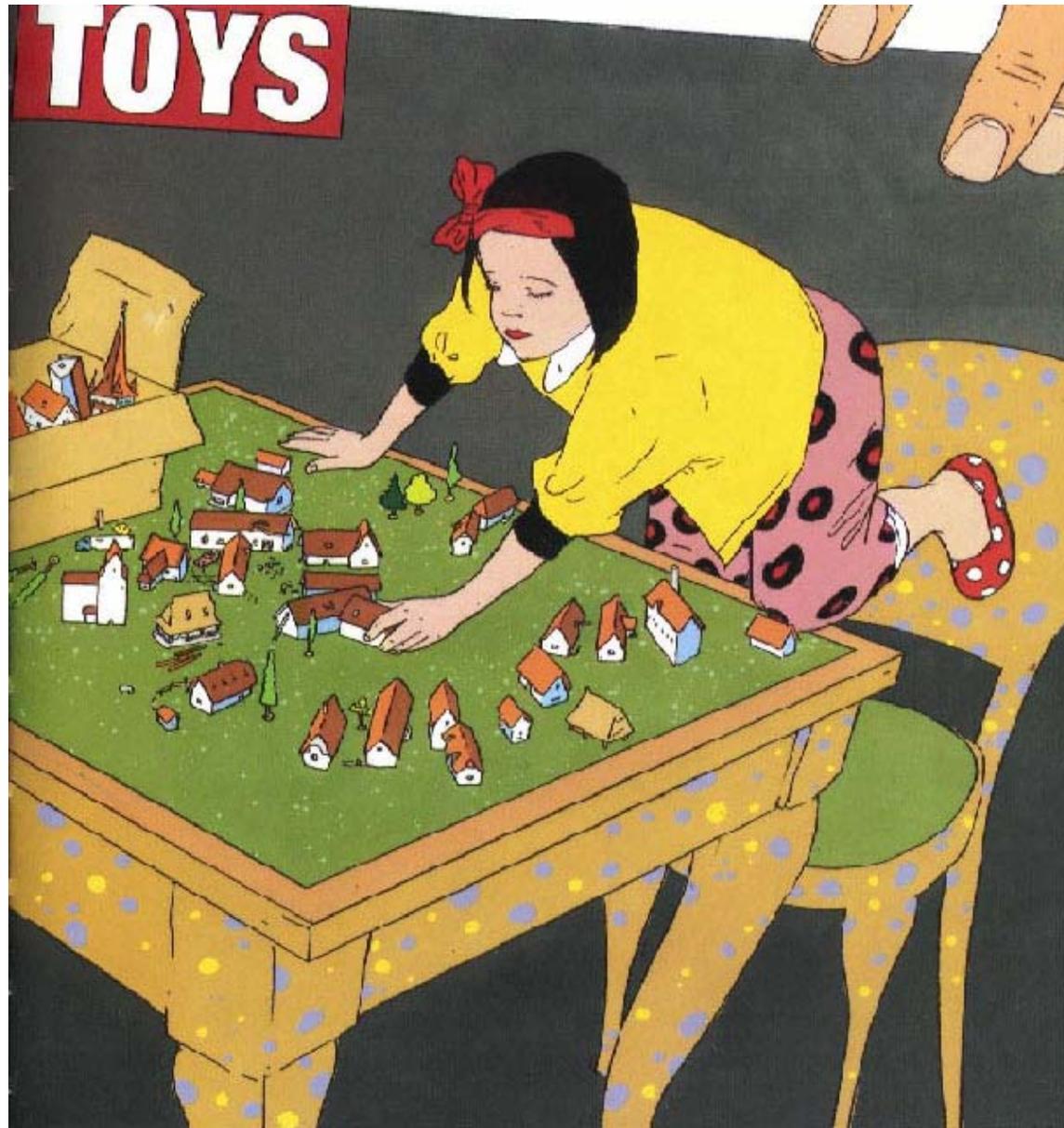




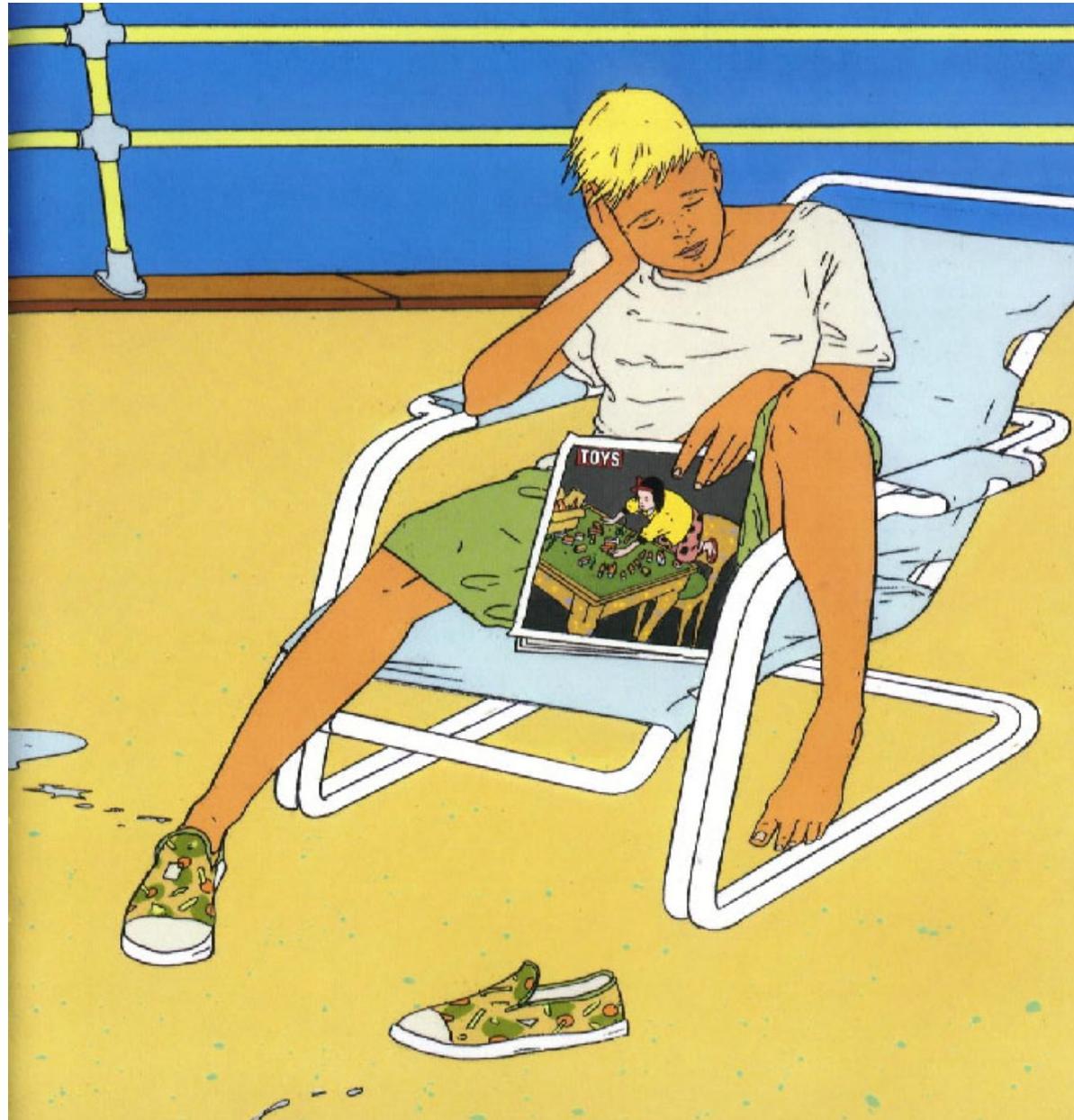




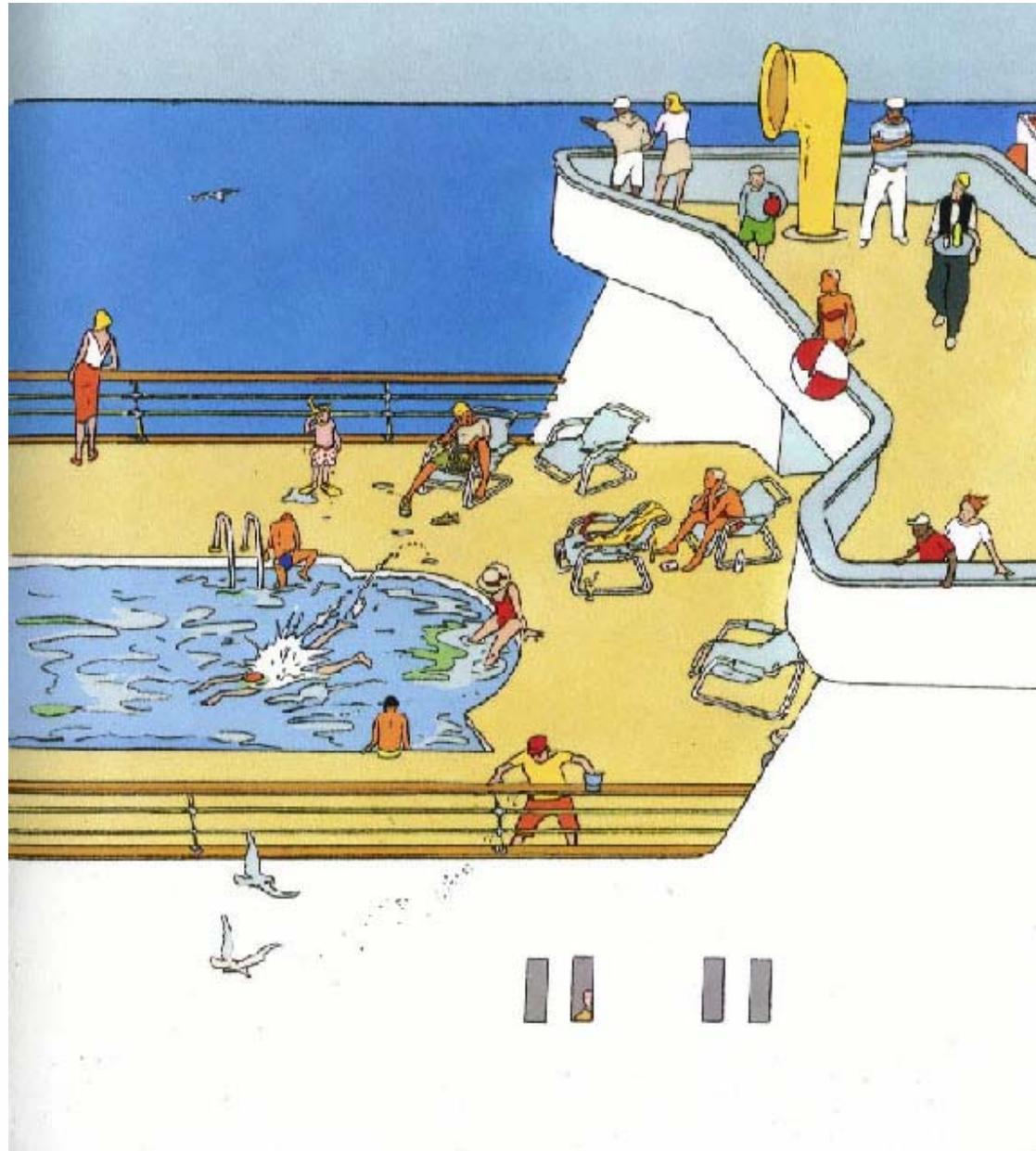




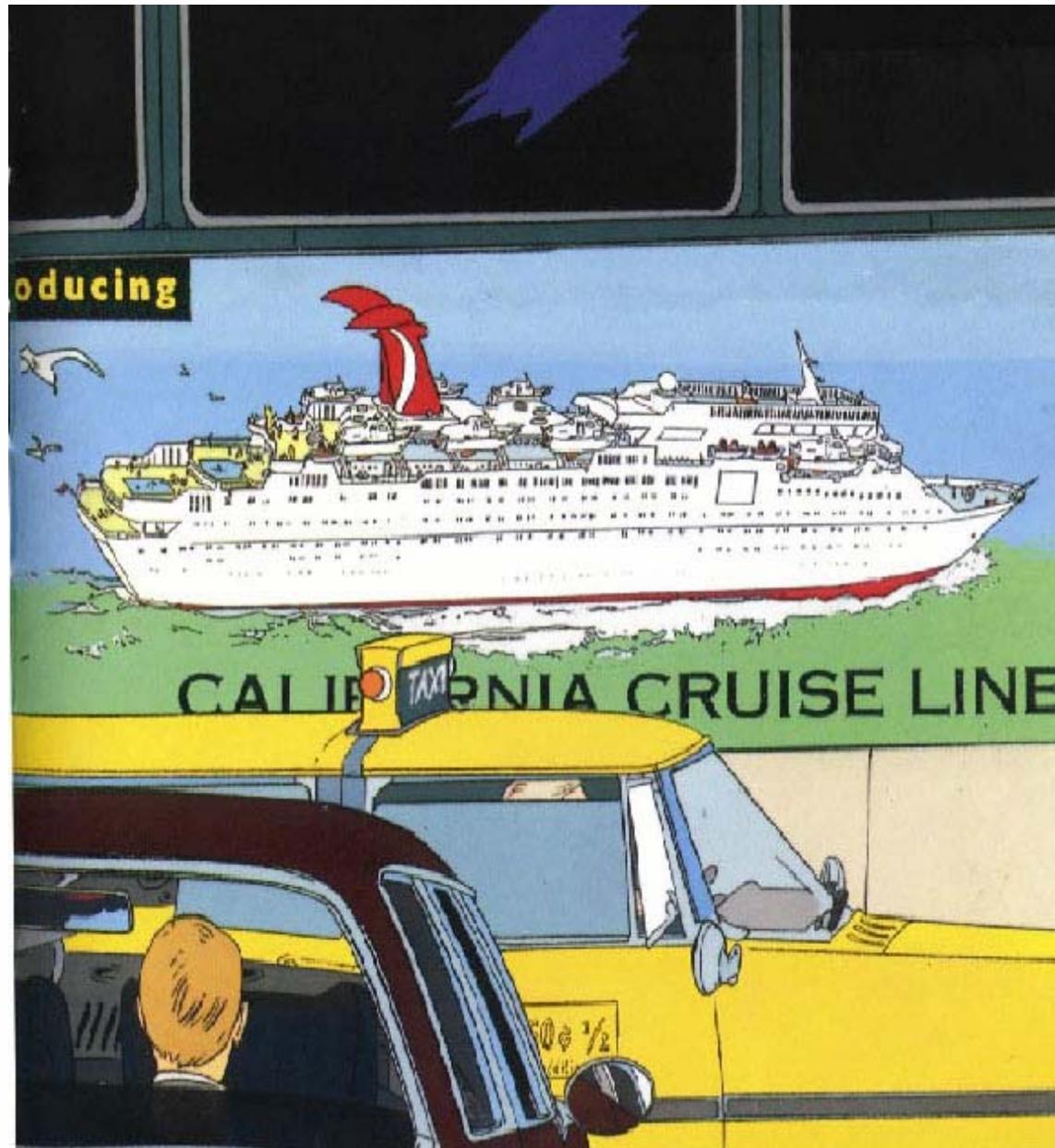




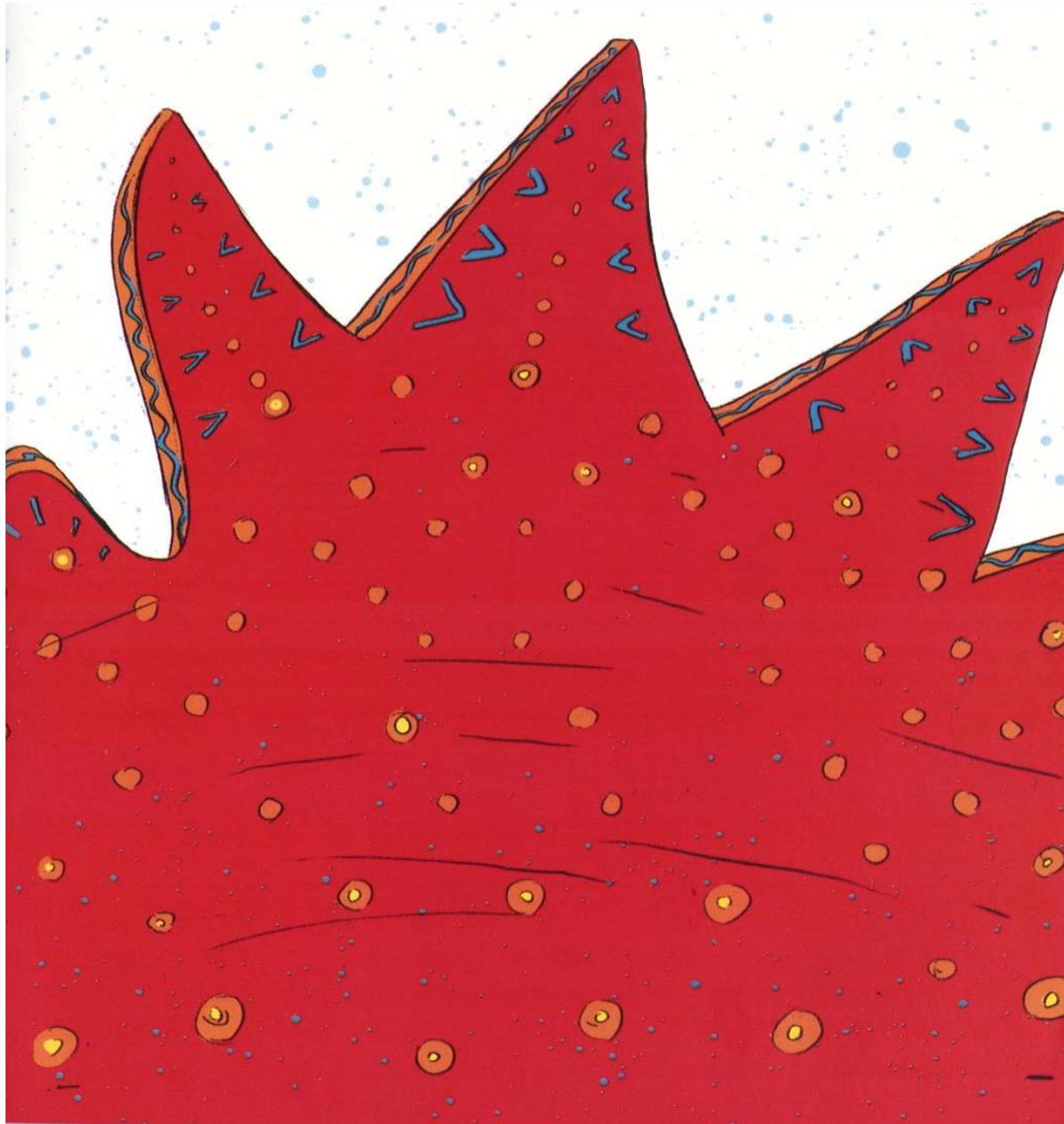


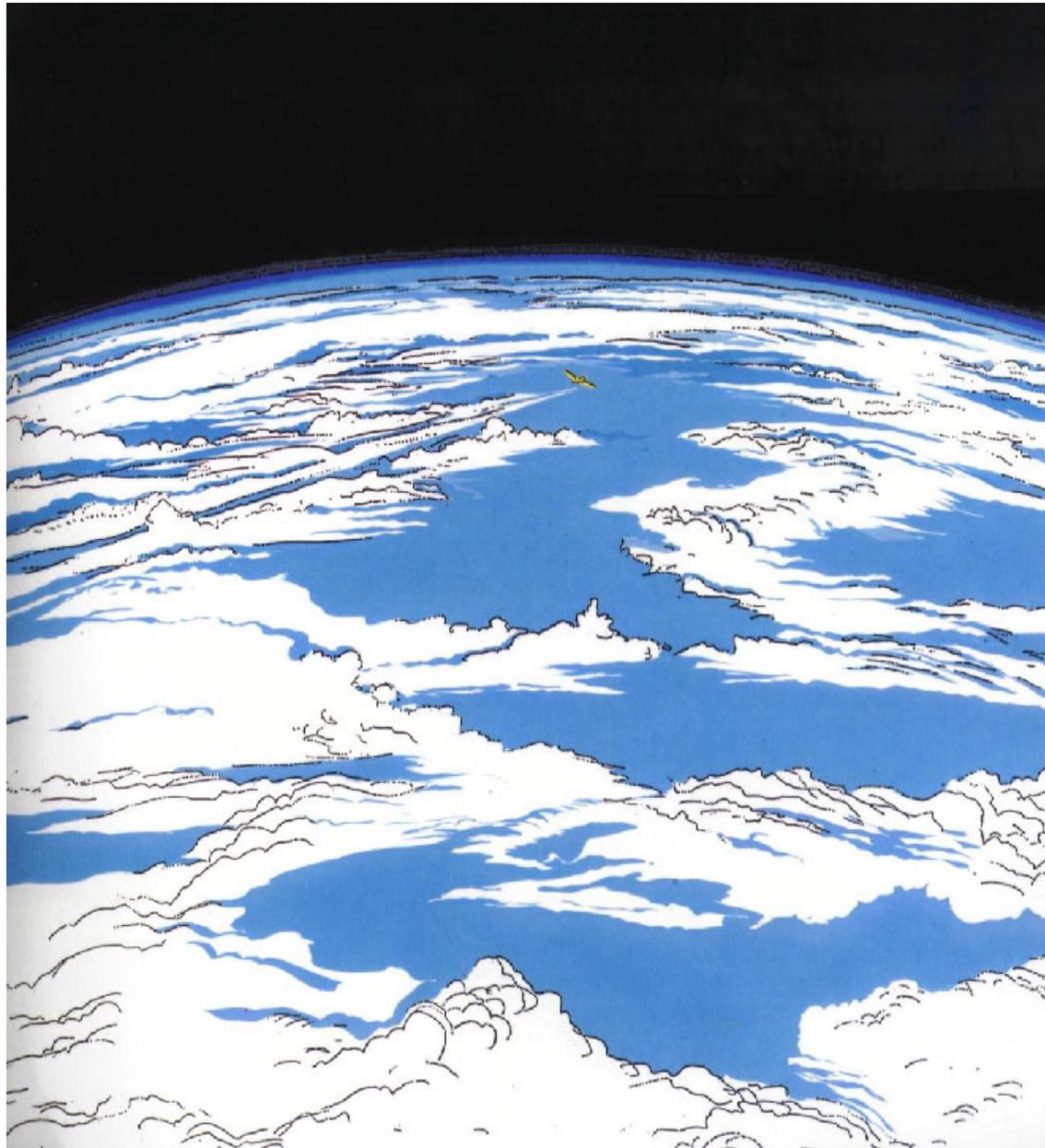














Strategic Planning is Intended to Create:

- A foundation for common understanding
- Build strong relationships between participants and their areas of responsibility
- Synergy, the creation of new energy that would not have existed without the opportunity to step back and perceive new ways to work and grow together



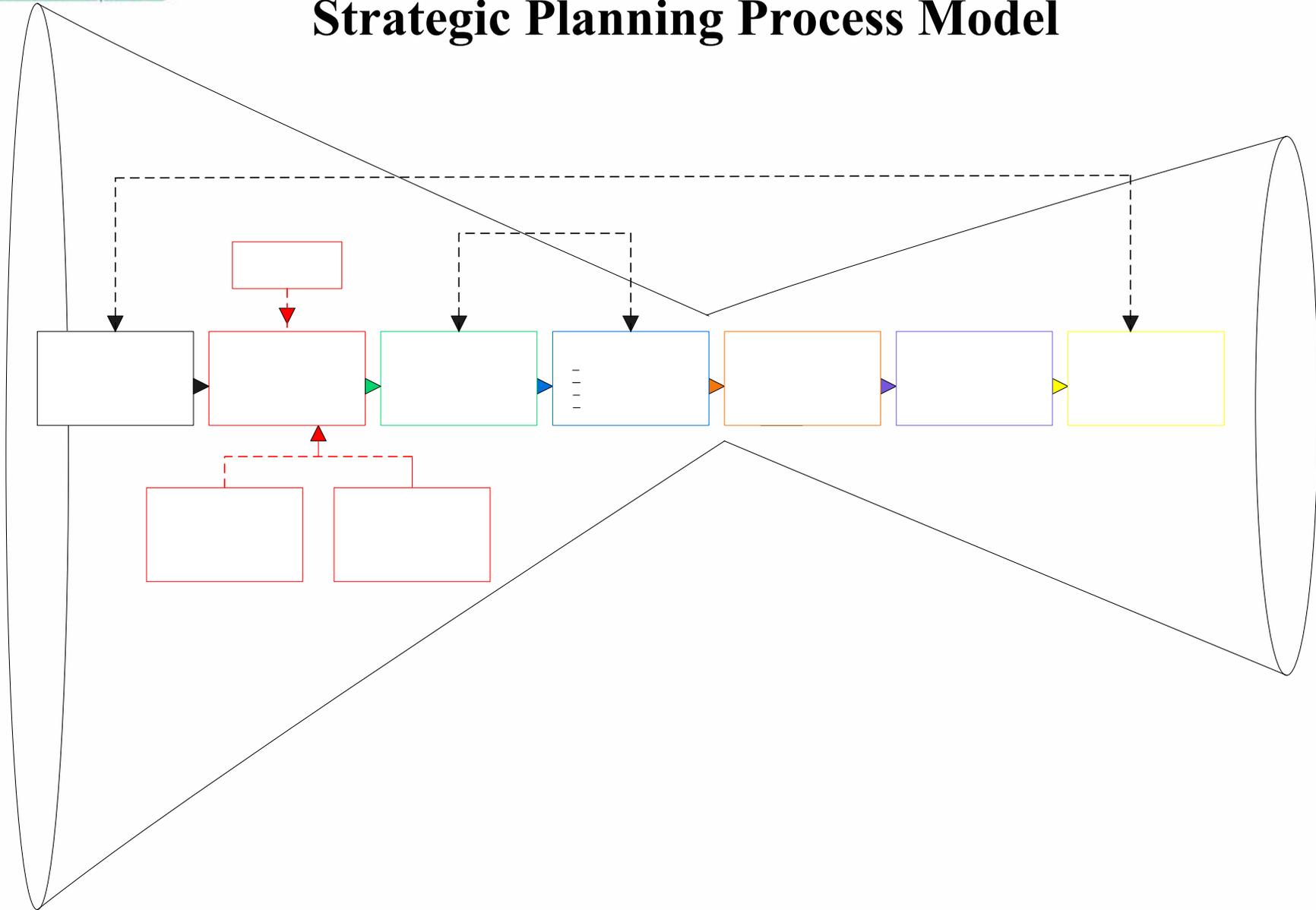
When NOT to Do Strategic Planning

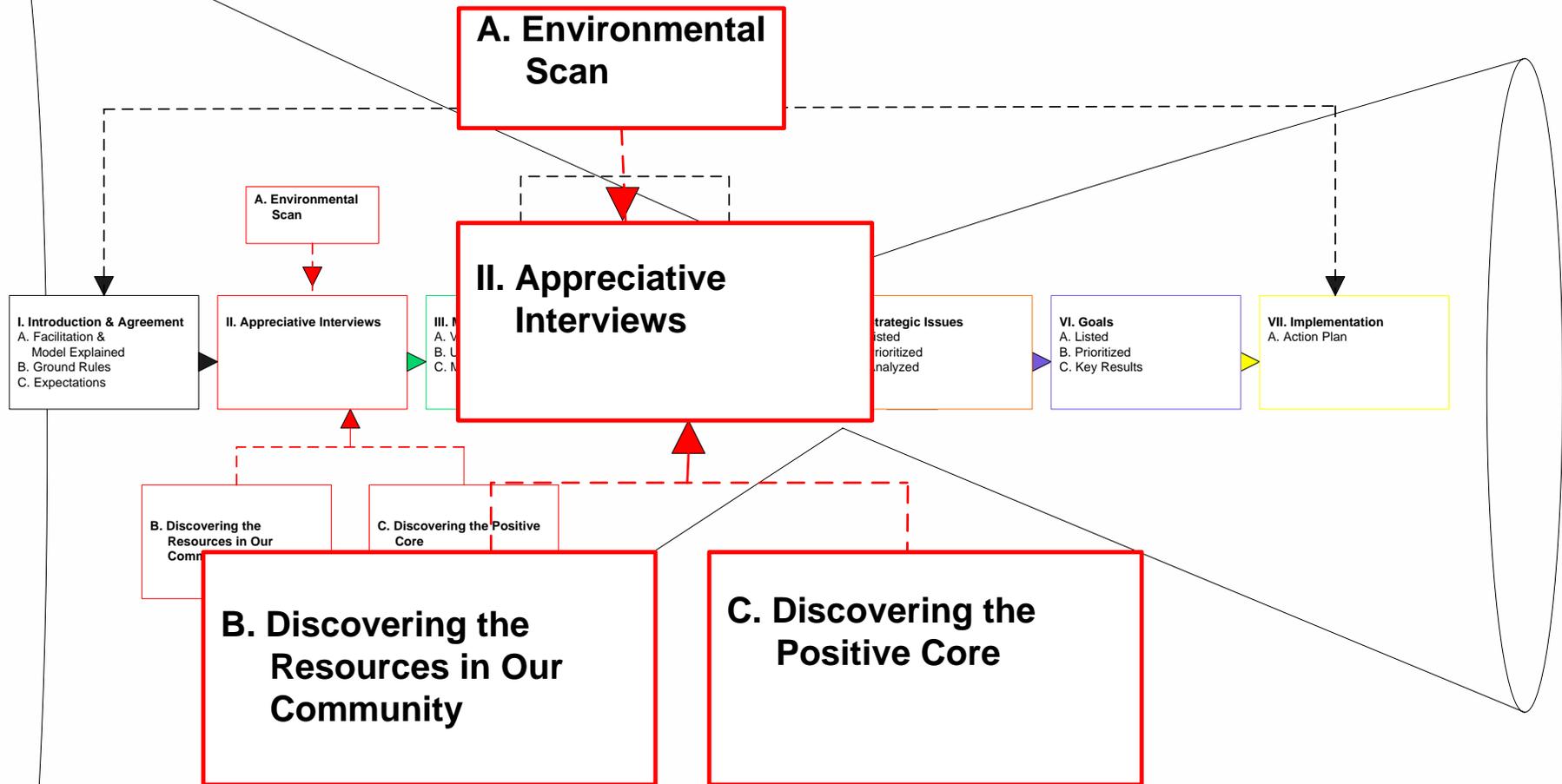
- Times of trauma
- When the prospects for developing a sound plan are slight
- If key stakeholders are unwilling to commit the time, money, and effort
- When there is no chance that the plan will be implemented



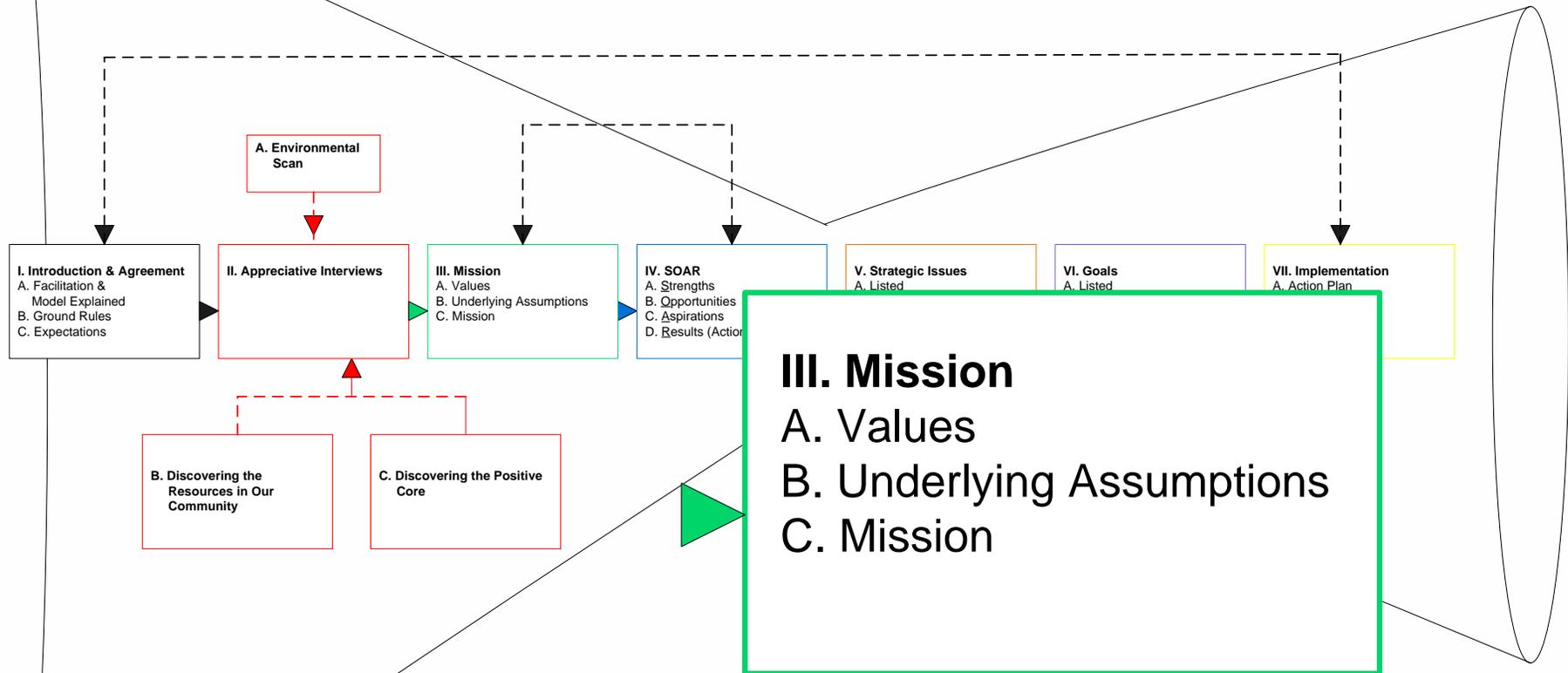
Summer Vacation Planning Activity

Strategic Planning Process Model

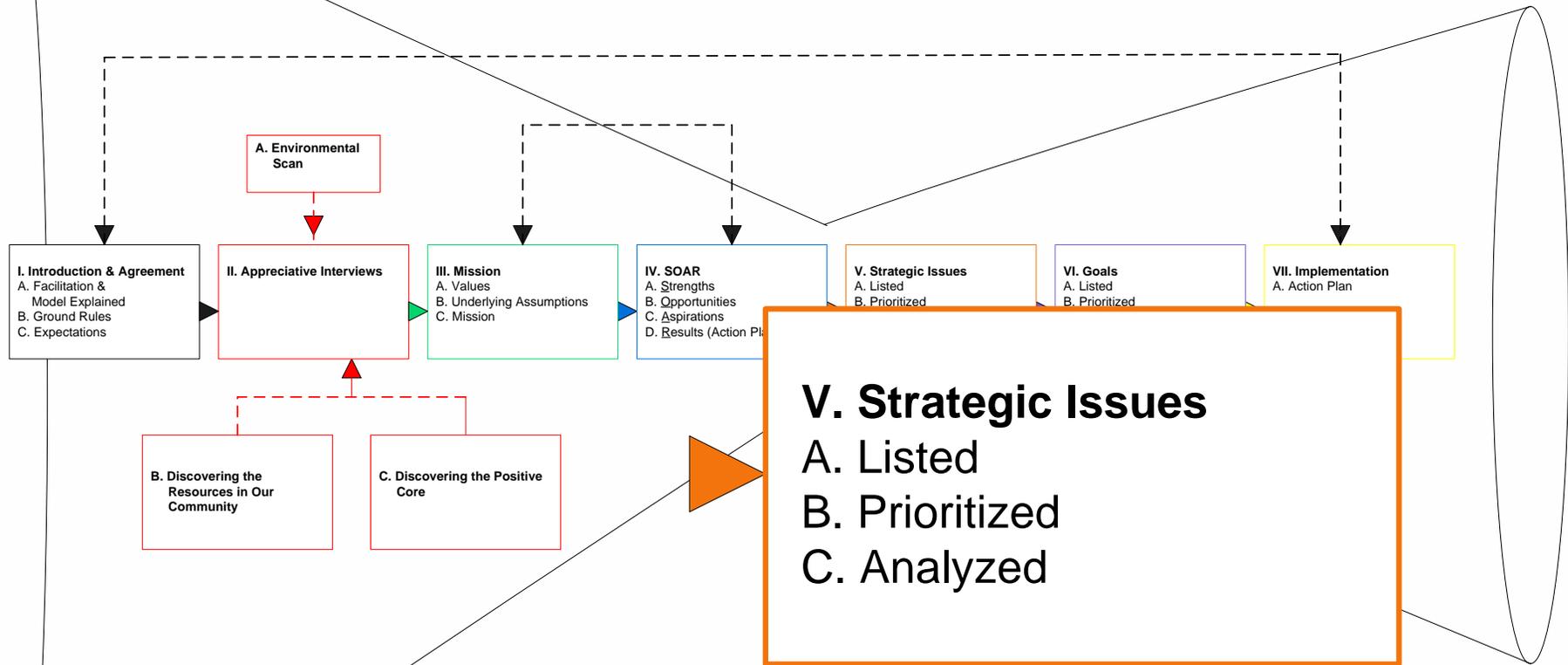




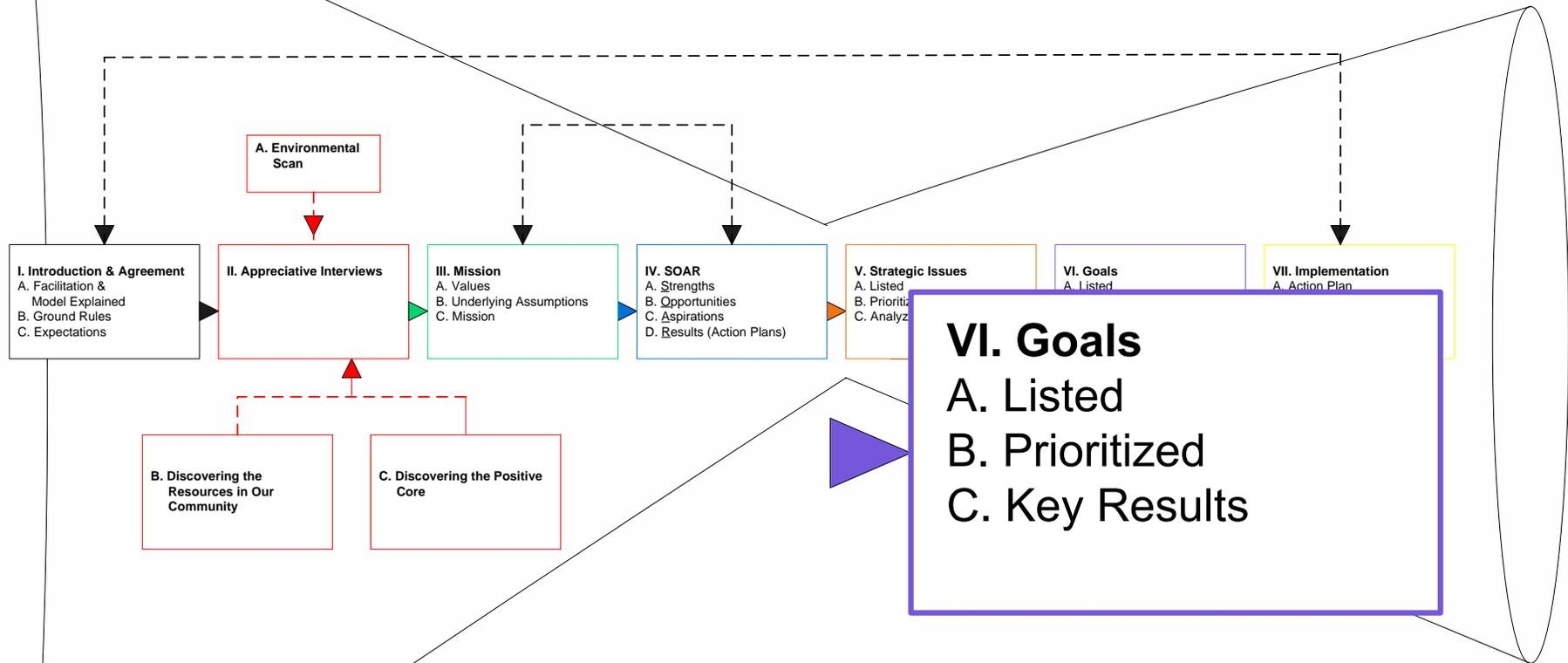
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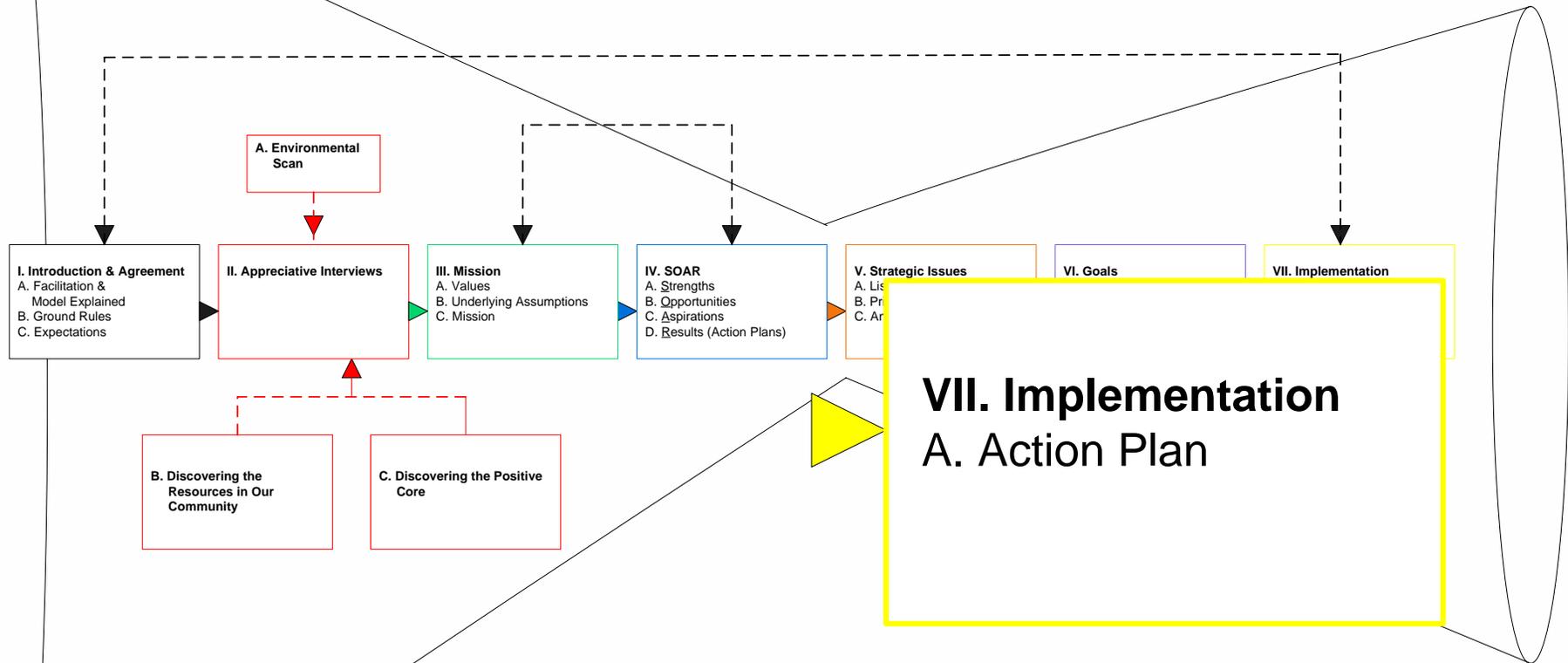
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Implementing the Strategic Plan

- What kinds of challenges have you faced in implementing your strategic plan?
- What components need to be in place to successfully implement a strategic plan?



Self- Monitoring Implementation

- Where are you in implementing your strategic plan?
- What is working and what could be improved?



Tools for Implementation

- Communication examples
- Action plan templates
- Additional resources

Organizational Excellence

Knowledge Management/
Continuous Improvement





Strategic Thinking

- In addition to formal strategic plans, thinking strategically, and encouraging the board and staff to think strategically, is a primary leadership responsibility.
- What is strategic thinking?
- How can you encourage strategic thinking in your organization?



Mahalo!



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A G E N D A

Time	Activity	Presenter
1:00 pm	Welcome & Purpose	Gigi Cairel
1:05 pm	Introductions & Expectations	Lily Bloom Domingo
1:20 pm	Overview of Agenda	Lily
1:25 pm	The Relationship Between Mission, Planning and Outcomes	Lily
1:35 pm	Planning – What a Concept!	Lily
2:10 pm	Strategic Planning Discussion	Lily
2:45 pm	Break	
3:00 pm	Planning for Change	Lily
3:40 pm	Implementing the Strategic Plan: Success Stories	Lily
4:10 pm	Organizational Excellence: Strategic Thinking	Lily
4:25 pm	Evaluation	Lily

The Purpose of Planning

- Planning helps an organization **clarify its mission** and **develop the goals** that guide its work.
- Plans should **include an evaluation component**. **Evaluation provides information** that the organization uses to **formulate goals** and the **framework to assess** whether the activities in the plan **were implemented effectively** and **achieved the desired results**.
- Because time and money are limited resources, nonprofits need to make certain that **what they do** is necessary and **reaches the people who need** and want the services. Nonprofits need to **ensure that how they provide services** and programs is **cost effective** and **achieves the results** anticipated. Planning and evaluation help organizations do just that.
- Nonprofit organizations must **combine planning and evaluation to make the compelling case to the community** that they are a valuable resource worthy of support.
- Planning is an **ongoing process** in an organization that occurs both **formally** and **informally** and can take **many forms** (long-range planning, strategic planning, program planning, action planning, outcomes-based planning, etc.)

Material adapted from:

The Nonprofit Board's Role in Setting and Advancing the Mission, by

Kay Sprinkel Grace, **Board Source**, 2003 and *The Nonprofit Board's Role in Planning and Evaluation*, by John A. Yankey and Amy McClellan, **Board Source**, 2003

Types of Planning

Type of Planning	What It Is, Who's Involved and When It's Useful
<p>Strategic Planning</p>	<ul style="list-style-type: none"> • Defines what an organization should do, why it should do it, and how it is planning to do it within the near future (3-5 years). • Encompasses broad strategic goals and strategies (and sometimes action steps). • Developed and used primarily by the board, staff, and other key stakeholders. • Useful when the environment is constantly changing and must be monitored and adjusted to in terms of strategic directions and activities.
<p>Operational Planning <i>(also referred to as: Action Planning or Tactical Planning or Work Plan)</i></p>	<ul style="list-style-type: none"> • A conversion of the strategic goals and objectives in a strategic plan into annual plans. • Often developed, implemented and evaluated by staff. Board approves and monitors the plan, particularly in relation to the budget, although in a small or young nonprofit, the board may be more actively involved in implementation. • Useful for day-to-day operations of the organization. It incorporates the strategic goals and objectives and identifies specific action steps, timelines, budget requirements, individual and/or organizational areas responsible for implementation, and a monitoring and evaluation process.

Material adapted from: *The Nonprofit Board's Role in Planning and Evaluation* by John A. Yankey, Ph.D. and Amy McClellan, MNO, **BoardSource**, 2003.

Compiled by Hawai'i Alliance of Nonprofit Organizations, 2007

Type of Planning	What It Is, Who's Involved and When It's Useful
Program-Level Planning	<ul style="list-style-type: none"> • Guides the programmatic work of staff. Often develops as an outgrowth of strategic planning. • Board needs to ensure plans are in place and monitored appropriately but the Executive Director and staff are typically responsible for program plans. • Useful for articulating resources needed for programs, service-delivery activities and quantities, and outcomes for program customers.
Business Planning	<ul style="list-style-type: none"> • Specifies the purpose of an organization or program and provides a snapshot of an organization's market, clients, competition, finances, and key personnel for accomplishing the stated purpose within a given time frame. Includes elements of organization's strategic plan and operational plan, particularly in the areas of marketing and financial management. • Typically developed, implemented and evaluated by staff. Board approves and monitors the plan. • Useful when developing new programs, expanding existing programs, considering mission-related business ventures to generate earned income or when exploring entrepreneurial ventures.

<p>Long-Range Planning</p>	<ul style="list-style-type: none"> • Outlines 10-20 years vision and directions, including operating assumptions based upon a relatively predictable external environment. • Developed and used by the board and staff. • Useful when an organization anticipates relatively few changes or can predict significant changes down the road.
<p>Scenario Planning</p>	<ul style="list-style-type: none"> • An organization often faces a variety of options that will impact its future. Scenarios are sketches of those possible futures. Scenario planning helps people and organizations project the implications of their choices within the constraints of several likely scenarios. By assessing the potential impact of existing and emerging forces, the organization can better prepare for and influence its future. • Scenarios can enable nonprofit leaders to identify priorities for their organizations, think creatively about new opportunities, and make effective strategic decisions. • Scenario planning exercises involve identifying trends and exploring the implications of projecting them forward. These can include political, economic, social and technological trends.

<p>Succession Planning <i>(Related: Emergency Succession Planning)</i></p>	<ul style="list-style-type: none"> • A proactive planning process to ensure smooth transition in the executive leadership of an organization. • The board is responsible for hiring the chief executive officer and therefore it has primary responsibility for managing the transition process. Whenever possible, the chief executive officer or other staff leaders should be involved in positively planning for their successor. • Useful when an organization anticipates a transition in executive leadership or to have in place in case of an unplanned emergency for short-term, long-term or permanent duration.
<p>Disaster Preparedness Planning <i>(also referred to as: Disaster Recovery Planning or Business Continuity Planning)</i></p>	<ul style="list-style-type: none"> • Disaster Preparedness is a relatively new planning endeavor for nonprofit organizations that has become a priority in the wake of large-scale natural and man-made disasters. The nonprofit sector has many responsibilities as first- and second-responders to disasters that need careful consideration and planning to ensure service availability when a disaster occurs. • The disaster preparedness plan describes how an organization is to deal with potential disasters. Assuming the continuation of normal functions is impossible, a disaster plan consists of the precautions and actions taken so that the effects of a disaster will be minimized and the organization will be able to either maintain or quickly resume mission-critical functions. • Typically, disaster preparedness planning involves an analysis of business processes and continuity needs; it may also include a significant focus on disaster prevention. Staff members are likely to lead the design of this plan, but board members should be kept fully apprised.

The Board's Role in Mission, Planning & Outcomes

Excerpted from *The Business of Boards is Serious Business* by G. Neil Karn, Voluntary Action Leadership, P.O. Box 4179, Boulder, CO 80306 and *Ten Basic Responsibilities of Nonprofit Boards*, Washington, D.C., National Center for Nonprofit Boards, Revised 1996, www.ncnb.org/askncnb/faq9_11.thm

Board functions can be organized essentially into six broad categories:

1. **Administration of the Corporation**
2. **Program Planning and Budgeting**
3. **Evaluating Organizational Effectiveness**
4. **Retaining and Evaluating Top Management**
5. **Financial Stewardship**
6. **Constituting the Community Connection**

The history, purpose and organization of policy-making boards certainly will differ, but these six functions apply uniformly.

1. Administration of the Corporation

By law, a nonprofit corporation must have a board of directors responsible for the management of its affairs, which involve the maintenance and legal direction of the corporation:

- The board **CONSTITUTES AND CONTINUES THE LEGAL ENTITY** by attending to legal requirements for the conducting of agency business
- The board **DEFINES THE ORGANIZATION'S PURPOSE** by establishing a clear statement of **MISSION** – its reason for being. It is the board's responsibility to review the mission of the organization periodically for accuracy and validity. Each individual board member should fully understand and support it.
- The board of directors **DETERMINES POLICY** for the organization. Policy statements establish governing principles, address procedural matters and provide an operational framework.

2. Program Planning and Budgeting

This area involves translating the organization's mission into a specific program plan, then budgeting the corporation's financial assets accordingly:

- The board of directors **DEFINES SPECIFIC NEEDS TO BE ADDRESSED AND TARGET POPULATIONS TO BE SERVED.**

- The board of directors **ESTABLISHES GOALS AND OBJECTIVES IN ORDER OF PRIORITY** consistent with the organization's purpose and which address the identified needs.
- Concurrent with the development of the program plan, the board of directors **DEVELOPS A REALISTIC BUDGET** which provides adequate financial resources to support the program plan and help the organization fulfill its mission.

3. Evaluation of Organizational Effectiveness

Having established policies and program goals, the third primary functional area for boards is ascertaining the organization's effectiveness in achieving its mission:

- The board of directors regularly **EVALUATES THE ACCOMPLISHMENT OF THE ADOPTED PROGRAM PLAN.**
- On a similarly regular schedule, although not necessarily as frequent, the board of directors must also **STEP BACK AND EVALUATE THE BIGGER PICTURE (STRATEGIC PLANNING)**. It must ask itself if the organization is truly achieving its purpose.
- The board must also **EVALUATE RESPONSIVENESS TO NEW SITUATIONS** (new opportunities and unanticipated needs).
- Finally, the board of directors must **EVALUATE THE DEGREE AND EFFECTIVENESS OF VOLUNTEER LEADERSHIP** in the organization.

4. Retention and Evaluation of Top Management

A fourth function of a board of directors is the selection and employment of the executive director and subsequent evaluation of this top manager.

- The board of directors must **HIRE THE RIGHT EXECUTIVE IN THE FIRST PLACE.**
- The board of directors **ESTABLISHES THE COMPENSATION AND CONDITIONS OF EMPLOYMENT FOR THE EXECUTIVE DIRECTOR.**
- The board of directors must not hesitate to **EVALUATE THE EXECUTIVE'S PERFORMANCE REGULARLY.**

5. Financial Stewardship

The board is responsible for the financial integrity and solvency of the corporation:

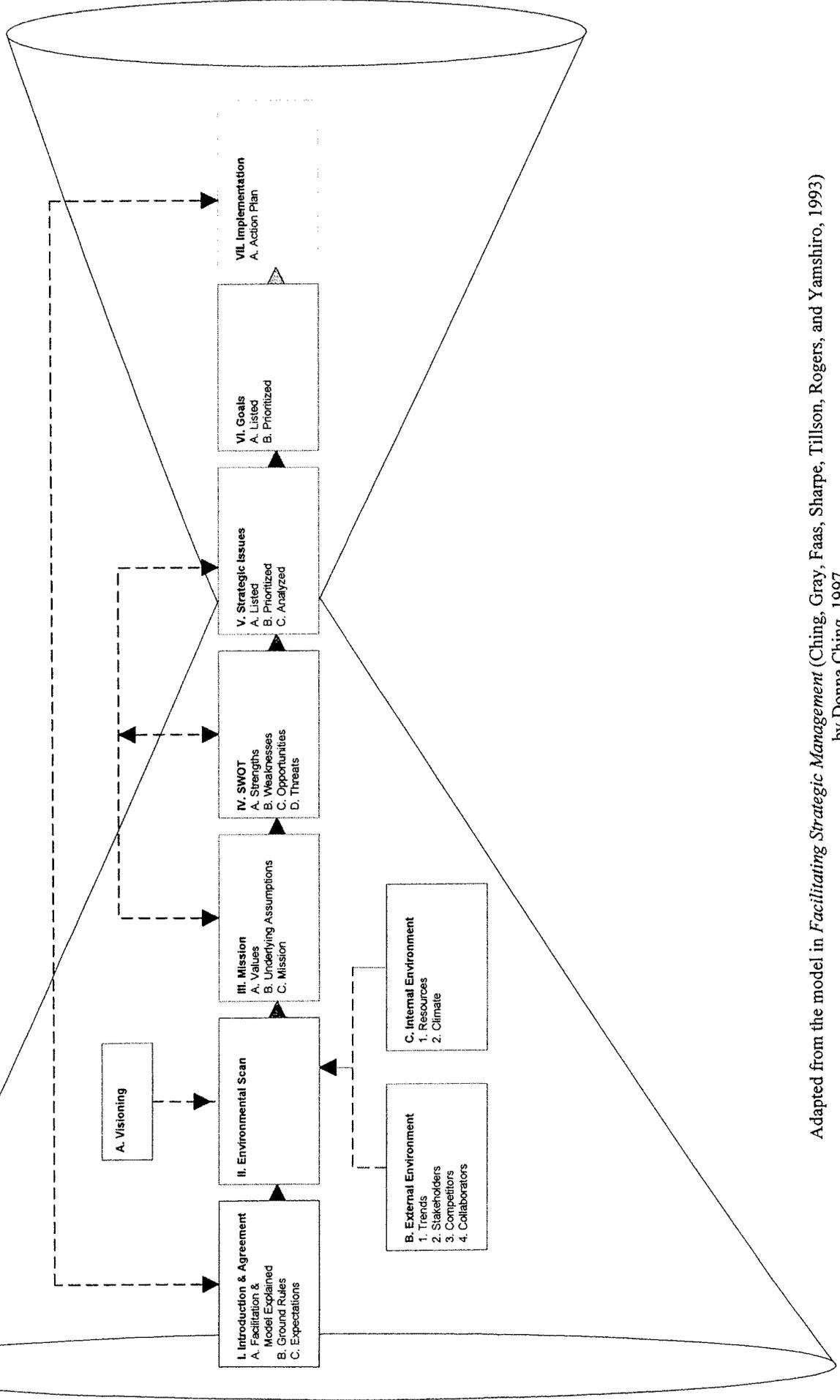
- The board of directors must take a lead in the **DEVELOPMENT OF FINANCIAL RESOURCES**.
- The board must **SET CONDITIONS AND STANDARDS FOR ALL FUNDS SOLICITED IN THE ORGANIZATION'S NAME**.
- In order to remain accountable to the organization's donors, the public, and to safeguard the organization's tax-exempt status, the board of directors must **EXERCISE FIDUCIARY CARE** of the funds entrusted to the organization.
- The board of directors must **ENGAGE IN SOUND LONG-RANGE FINANCIAL PLANNING**.

6. Constituting the Community Connection

The sixth function of boards involves serving as a link between the community and organization.

- The board of directors **REPRESENTS THE PUBLIC INTEREST**. The board has a moral responsibility to the community-at-large to ensure both program and fiscal accountability.
- The board of directors **REPRESENTS THE INTERESTS OF PARTICULAR PUBLICS**. They must ensure that the full range of community views and values are incorporated into organizational decision-making.
- The board of directors **REPRESENTS THE ORGANIZATION TO THE COMMUNITY**. The board has a responsibility to interpret and clearly articulate the organization's mission, accomplishments, and goals to the community. This connection is crucial to image building and the development of community support.
- The board of directors **AFFORDS COMMUNITY SANCTION** to an organization and its programs. This "legitimizing" role is crucial for gaining access to both the clientele the agency intends to serve and the resource holders it needs to tap.

Strategic Planning Process Model



Adapted from the model in *Facilitating Strategic Management* (Ching, Gray, Faas, Sharpe, Tillson, Rogers, and Yamshiro, 1993)
 by Donna Ching, 1997

Strategic Planning

What Strategic Planning Is:

- Strategic planning is a process that seeks the **strategic fit between the mission** of an organization and **its internal strengths and external opportunities**
- Strategic planning **develops a shared vision among the stakeholders** of an organization and a **blueprint for how to move towards its vision** or preferred future
- Strategic planning builds **strong relationships between participants** and their **areas of responsibility**
- Strategic planning **creates synergy** - new energy that would not have existed without the opportunity to step back and perceive new ways to work and grow together
- In strategic planning an organization engages **in deep reflection and self-evaluation**. It relies on gathering and evaluating data and information from the organization's internal and external environments
- **Strategic planning activities** include:
 - ✓ Development or review of the **vision**
 - ✓ Development or review of the **mission**
 - ✓ Examination of **external factors** that may affect the accomplishment of the mission
 - ✓ Examination of **organizational strengths and weaknesses** that may affect the accomplishment of the mission
 - ✓ Creation of **goals and objectives**
 - ✓ Description of **how those goals and objectives will be implemented, by when, and the resources necessary** for implementation
 - ✓ Establishment of **performance outcomes that will indicate the degree to which the goals and objectives have been achieved**

What Strategic Planning is Not:

- Strategic planning is **not the answer to many common organizational problems**:
 - ✓ Unanticipated deficits
 - ✓ Failure to meet fundraising goals
 - ✓ Executive management disputes
 - ✓ Board disputesThese kinds of crises are generally best resolved with short-term planning tools, consensus building exercises and/or conflict resolution activities
- Strategic Planning is **not a staff meeting convened for the purpose of setting goals**. Done well, strategic plans articulate desired outcomes that often trigger new and/or improved core policies and practices. Staff input is critical to the process, but staff alone cannot and should not be expected to establish the strategic direction of the organization

When not to do Strategic Planning:

- **Times of trauma** – a long range plan will not alleviate the pain associated with the firing or an executive, the loss of an important volunteer leader, or the deepening of a financial crisis
- **When the prospects for developing a sound plan are slight** – when one or a few people make it clear that they want to use the planning process to further an agenda featuring a favorite but unneeded program, project or facility, it will almost always doom the process to failure (in these cases, postpone strategic planning until the disputed issue has been resolved)
- **If your key stakeholders are unwilling to commit time, money, and effort to the venture** – without such an investment, planning is a useless activity
- **When there is no chance that the plan will be implemented** – strategic planning requires the commitment of stakeholders not only to the process, but to the implementation, evaluation, and adjustment of the plan

Material adapted from:

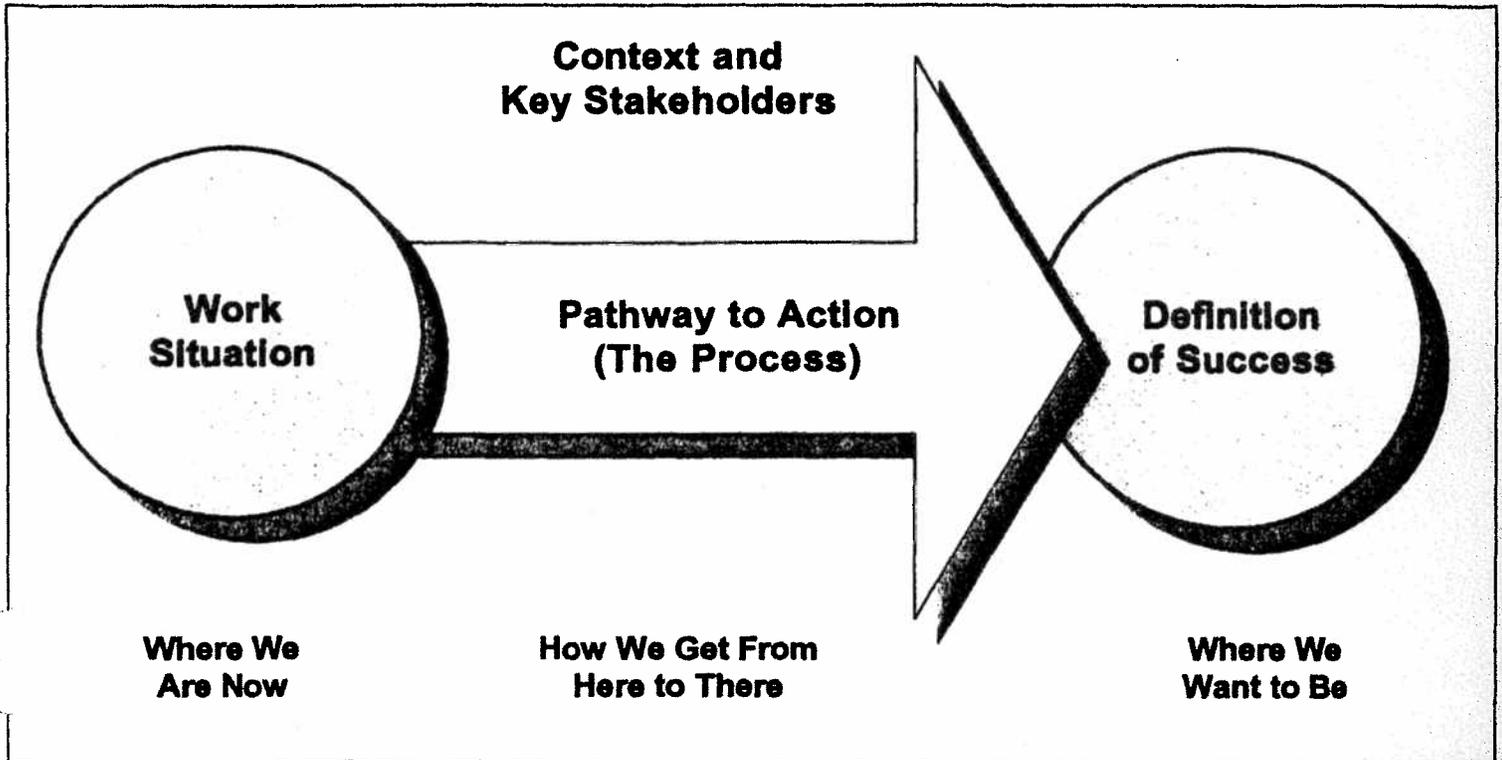
The Nonprofit Board's Role in Setting and Advancing the Mission, by Kay Sprinkel Grace, **Board Source**, 2003, *The Nonprofit Board's Role in Planning and Evaluation*, by John A. Yankey and Amy McClellan, **Board Source**, 2003, *Strategic Planning and the Nonprofit Board*, by Dabney G. Park, Jr., **National Center for Nonprofit Boards**, 1990, and *The Sustainable Nonprofit - Strategic Planning: Five Steps to a More Secure Future*, by Carl Richardson, **Philanthropy News Digest - The Foundation Center**, 2004

SUMMER VACATION PLANNING

Instructions: Imagine that you have a three-week vacation during this upcoming summer and you are starting to think about it. Please answer the questions below.

1. Mark where in the world you live now.
2. Of the activities listed below, which would you do and in what order?
 - ___ a. Decide where I'll go, what I'll do, and how I'll get there.
 - ___ b. Consider all the things that could keep me from going on vacation.
 - ___ c. Just pack and go.
 - ___ d. Envision the perfect vacation.
 - ___ e. Schedule a time(s) when I'll plan my vacation.
3. Mark three places where you might want to go on vacation.

PLANNING FOR CHANGE



Work Situation

Where we are now:

The issue or opportunity needing attention or requiring action.

Definition of Success

Where we want to be:

The desired outcome of the change or improvement effort.

Context

The circumstances surrounding and factor impacting, the change effort.

Stakeholders

Individuals or groups who can substantially support, block or influence the effort.

Pathway to Action

How we get from here to there:

The process for helping leaders and teams to get from where they are to where they want to be.

Critical Components for Implementing Your Strategic Plan

- **Champion** – the person, usually the CEO and/or a key board member who helps keep everyone focused on the plan and its status
- **Commitment to the plan by all stakeholders** who can significantly influence the success or failure of the plan
- **Clear mission and shared values**
- **Annual budget** includes resources committed to deliver the plan
- **Culture & communications** tie individuals, programs and the organization to the plan and its implementation
- **Accountability** through individual, programmatic and organizational evaluations
- **Regularly scheduled opportunities to report** on the plan status
- **Learning** – it's not about getting everything right, it's about what we learn on the way
- **Change by implementing the lessons learned** to reshape the plan; work the plan, don't let it work you

Material adapted from:

A Concise Guide to Facilitating Strategic Thinking & Planning: the Two-Day Retreat, by Donna Ching (1997) and *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook (1997)*, by Michael Allison and Jude Kaye.

Steps Required for Implementing the Strategic Plan

Required Steps	Yes	In Progress	Not Yet
All board and staff members are knowledgeable about the organization’s mission, values and strategic direction.			
The strategic plan is supported by an operational plan (tactical plan, work plan) and a budget.			
Staff members’ work plans and performance reviews include how they support the strategic direction of the organization.			
Systems and processes to monitor and evaluate the plan have been developed; regularly status checks occur.			
Status reports on the strategic plan are on the board’s agenda on a quarterly basis.			
The board regularly engages in strategic thinking and conversations, at least once each quarter.			
Lessons learned through implementation are articulated and documented.			
The strategic and operational plans are updated annually in response to lessons learned.			
Keep at it!			
Comprehensive strategic reflection and planning occurs every 3-5 years.			

Material adapted and modified from:
Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook (1997), by Michael Allison and JudeKaye, and Hawai'i Alliance of Nonprofit Organizations' *Board Alive! Manual (2007)*



Strategic Plan, 2006-2009

Mission Statement

Hawai'i Alliance of Nonprofit Organizations unites and strengthens the nonprofit sector as a collective force to improve the quality of life in Hawai'i.

Goals and Objectives

Goal #1: Build a diverse alliance of nonprofit members, statewide and sector-wide, working in harmony.

OBJECTIVES

1. Design and implement appropriate association governance.
2. Develop policies and guidelines to create and maintain member participation and relationships.
3. Form and foster collaborations and partnerships.

Goal #2: Be an advocate for the nonprofit sector to build community awareness of its value and how to invest resources.

OBJECTIVES

1. Provide communications, tools and resources to facilitate member dialog.
2. Gather and disseminate data about the sector and the community.
3. Engage in education and advocacy.

Goal #3: Establish a firm business foundation for HANO and financial commitment from its members.

OBJECTIVES

1. Recruit and retain members. (Everyone is responsible – board, staff and members.)
2. Create and execute business and fund development plans.
3. Develop and market member services.

HANO's Values

- HANO listens, builds community, provides leadership; it is responsive, member-driven, relevant, up-to-date and approachable. HANO is transparent, honest, accountable and ethical; it upholds the principles we espouse and has integrity.
- HANO is facilitative, generative, entrepreneurial, innovative, cutting-edge, forward-looking and continuously learning. HANO embraces diversity and is inclusive.

HANO's Vision

• Leadership & convening

HANO unites the nonprofit sector to help build a healthier, more socially cohesive community. Its leadership gives the sector its influence. When other state associations are formed, HANO is the model to follow. HANO understands and works to meet the needs of the community collaboratively.

HANO strengthens the nonprofit sector as a place of volunteerism. It actively works to find new common ground, facilitates stronger human relationships among nonprofits and helps to resolve disputes.

• Advocacy & public policy

HANO has as much influence on public policy as the public employees union does. HANO is a party at the table for discussions of philanthropy, business and economic development. It represents the third sector, with for-profits and government, each with equal value and equal weight in the community. It leads us into a new era of civic responsibility

Nonprofits, small and large, feel represented by HANO. Its aggregate knowledge of the community and its needs informs public policy. HANO educates the community to recognize the power of the nonprofit sector.

• Professional development & capacity building

Using high quality, wide ranging, collaboratively delivered, capacity-building services, HANO works to build the organizational capacity and improve governance and accountability of Hawai'i nonprofits. Member organizations become models of management processes for both the nonprofit and private sectors. Nonprofits become the employers of choice in terms of compensation and professional development.

HANO fosters learning and supports nonprofit leaders and staff to reduce burnout; it contributes to a system to nurture and support new nonprofits; and it welcomes new, fresh faces into the field and provides mentors to support them.

HANO provides technical assistance for mission-related income-generating activities. It embraces new technologies and applies them to carrying out its mission. HANO continues to be recognized for technical assistance and consultation for nonprofit sector, meeting increasing demands.

• Research & information

HANO is at the cutting edge in terms of knowing community needs. It expands our exposure to innovations outside of Hawai'i. Its influence is driven by data and knowledge.

HANO is the organization to go to with questions about nonprofits.

• Communications

HANO has reliable mechanisms for staying attuned to its constituency and provides a communication and support network for nonprofits in Hawai'i.

• Products & services

HANO works to provide rich programs and services for all sizes of nonprofits to save them time and money. It provides members access to risk management, financial and human resource services. It markets the nonprofit sector to vendors, service providers, funders and others for mutual benefit.

HANO is self-sustaining and self-supporting.

The HANO Strategic Plan – its mission, goals, objectives, values and vision – was recorded at a two-day planning retreat in June 2006 facilitated by Donna Ching of the University of Hawai'i-Manoa.

Sample One Page Business Plan – Not-for-Profit Organization



vision

Build BAEA into a nationally recognized micro-enterprise organization with an extensive greater San Francisco Bay Area network of entrepreneurial support groups providing nationally recognized products, programs and services to entrepreneurs, small business owners, and partner organizations..



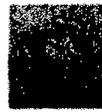
mission

Create viable businesses and successful entrepreneurial leaders through networking, support and connection to resources.



objectives

- Increase membership from 150 to 300 by 12/31t.
 - Launch 2 networks by 6/30 and add 3 more networks by 12/31
 - Generate \$8,000 from entrepreneurial programs, events and products in this FY.
 - Host 3 regional network events with at least 50 attendees each and generate \$3,000.
 - Conduct 4 workshops/programs with an average of 25 participants and generate \$4,000.
 - Increase low-income members to 25 and increase minority members 25% by 3/20.
 - Award 5 scholarships totaling \$1,300 in current FY.
 - Recognize 10 entrepreneurs for outstanding business growth & community service.
-



strategies

- Use public relations and media to share successes, educate, recruit and fund.
 - Market and sell BAEA endorsed products and services nationally.
 - Collaborate with nat'l micro-enterprise org. in nat'l awareness programs and funding.
 - Establish BAEA center to create long-term community presence & financial asset base.
 - Enlist key community leaders and businesses to launch and develop new networks.
 - Attract/retain low-income entrepreneurs by offering scholarships funded by corp. sponsors.
 - Utilize multi-lingual/cultural programs to attract minority entrepreneurs.
 - Package successful BAEA programs & products to sell to other micro-enterprise orgs.
 - Use technology to manage growth, streamline ops., and deliver programs, & sell products.
-



plans

- Complete 5-year Strategic Plan by 4/30.
 - Complete funding plan by June 15th.
 - Hire executive director by 12/31.
 - Expand board of directors from 4 to 7 by 11/15.
 - Develop BAEA product and service marketing plan by 3/31
 - Develop 2-year network expansion plan by 6/30
 - Launch sales/marketing plan of One Page Business Plan by 7/10.
 - Implement PR Plan by 8/20.
-

Action Plan Template for Strategic Planning

Goal 1 Compelling Case

Insert compelling case statement for Goal 1 here.

Goal 1: Insert Goal 1 statement here.

Objectives	Actions	Who & By When
1. List first objective here.	1. List first action step here. 1.1 List sub-steps 1.2	Who: List who is responsible By: Establish a deadline date Res: Identify critical resources required Eval: Indicate how success will be evaluated or observed
	2.	Who: By:
2. List second objective here.	1.	Who: By:

Goal 2 Compelling Case

Insert compelling case statement for Goal 2 here.

Goal 2: Insert Goal 2 statement here.

Objectives	Actions	Who & By When
1. List first objective here.	1. List first action step here. 1.1 List sub-steps 1.2	Who: List who is responsible By: Establish a deadline date Res: Identify critical resources required Eval: Indicate how success will be evaluated or observed
	2.	Who: By:
2. List second objective here.	1.	Who: By:

Repeat for any additional goals.

Additional Resources for Implementing Your Strategic Plan

The Balanced Scorecard: Translating strategy into action. Authors: Robert S. Kaplan and David P. Norton. Published by Harvard Business School Press, Boston Massachusetts. (1996)

The Balanced Scorecard and Nonprofit Organizations. Author: Robert S. Kaplan. (Published November 15, 2002.) Available at Harvard Business Online: harvardbusinessonline.org.

Balanced Scorecard Step-by-Step for Government and Nonprofit Agencies. Author: Paul R. Niven. Published by John Wiley & Sons, Inc, Hoboken, New Jersey. (2003)

Building a Strategy-Focused Organization. Authors: Robert Kaplan and David Norton. A paper adapted from Chapter 1 in **The Strategy-Focused Organization.** Harvard Business School Press, Boston, Massachusetts. (2001)

Executive Directors Guide: The guide for successful nonprofit management. Authors: Deborah Linnell, Zora Radosevich, Jonathan Spack, and Third Sector New England, Boston, Massachusetts. Published by United Way of Massachusetts Bay. (2002)

Good to Great: Why some companies make the leap . . . and others don't. Author: Jim Collins. Published by HarperCollins Publishers, Inc. (2001)

Good to Great and the Social Sectors: A monograph to accompany good to great. Author: Jim Collins. Published by HarperCollins Publishers, Inc. (2005)

Governance as Leadership: Reframing the work of nonprofit boards. Authors: Richard P. Chait, William P. Ryan, Barbara E. Taylor, and BoardSource, Inc. Published by John Wiley & Sons, Inc, Hoboken, New Jersey. (2005)

Logic Model Development Guide: Using logic models to bring together planning, evaluation and action. Author and publisher: W. K. Kellogg Foundation, Battle Creek, Michigan. Revised edition. (2006)

Navigating the Organizational Lifecycle: A capacity-building guide for nonprofit leaders. Author: Paul M. Connolly. Published by BoardSource, Inc., Washington, D.C. (2006)

The Nonprofit Answer Book: Practical guide for board members and chief executives. Authors: Robert C. Andringa and Ted W. Engstrom. Published by BoardSource, Inc., Washington, D.C. (2002)

The Nonprofit Dashboard: A tool for tracking progress. Author: Lawrence M. Butler. Published by BoardSource, Inc., Washington, D.C. (2007)

Strategic Performance Measurement and Management in Nonprofit Organizations. Author: Robert Kaplan. Published by John Wiley & Sons, Inc, Hoboken, New Jersey. (2001)

Strategic Thinking

What Strategic Thinking Is:

- Strategic thinking emphasizes *continuous* planning, evaluation and learning that enables staff, clients and other stakeholders to add their voices and input to the decision-making process at any time.
- Strategic thinking allows for changes in direction, goals, and activities (while staying within the mission) as needed in response to the fast-paced environment. Plans are written, revised, and/or discarded as needed. **Mid-course corrections are the norm.**
- The learning cycle involved in strategic thinking allows for:
 - ✓ **Questioning the plan while it is still in progress** so that it can be refined and modified.
 - ✓ **Reflecting on what has been learned through implementation and evaluation.**
 - ✓ **Revising vision, strategies and action plans whenever necessary**, not just during a formal planning process.

How to Nurture Strategic Thinking in your Organization:

Good leaders think strategically and help raise board and staff consciousness by nurturing strategic thinking in their organization. They do so by:

- Providing **ongoing training and capacity-building** that enables staff and board to better engage in their role as stewards of the mission, vision, values and overall direction of the organization.
- Coaching board and staff to **learn from the past and anticipate multiple possible futures** by providing learning opportunities related to:
 - ✓ **Formal and informal evaluation techniques.**
 - ✓ **Scenario planning**, including the ability to re-envision quickly in order to address crises.
- **Acknowledging your board and staff for their successes and celebrating as an organization.**

Material adapted and modified from:

Executive Directors Guide: The Guide for Successful Nonprofit Management, by Deborah Linnell, Zora Radosevich, Jonathan Spack, **Third Sector New England**, 2002.



How Mission Planning & Outcomes Are Related



Hawai'i Alliance of Nonprofit Organizations



Where Mission, Planning & Outcomes Overlap



Hawai'i Alliance of Nonprofit Organizations