

Creating a Strategic Plan  
that doesn't collect dust  
after it's made.

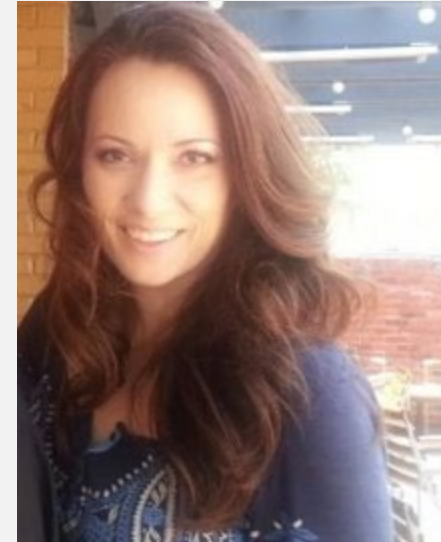
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*APRIL National Conference for  
Rural Independent Living  
Oct. 21, 2021*

**APROSAE**

# Introduction

- Leadership roles for strategic planning, marketing, and development/fundraising for nonprofits.
- For almost 6 years, on the Executive Leadership team for a CIL as Director of Marketing.
- Started Aprosaе, a strategic planning and marketing agency for the Independent Living movement.
  - Facilitator for two collaboratives that NCIL has run.
  - Presented at NCIL, APRIL, and state IL conferences.
  - Led marketing solutions for CILs across the U.S.



*Michelle West*

**APROSAE**

# Agenda

- 1 Overview of Strategic Planning
- 2 The 5 Parts of the Strategic Planning Process
- 3 Dust Prevention Plan





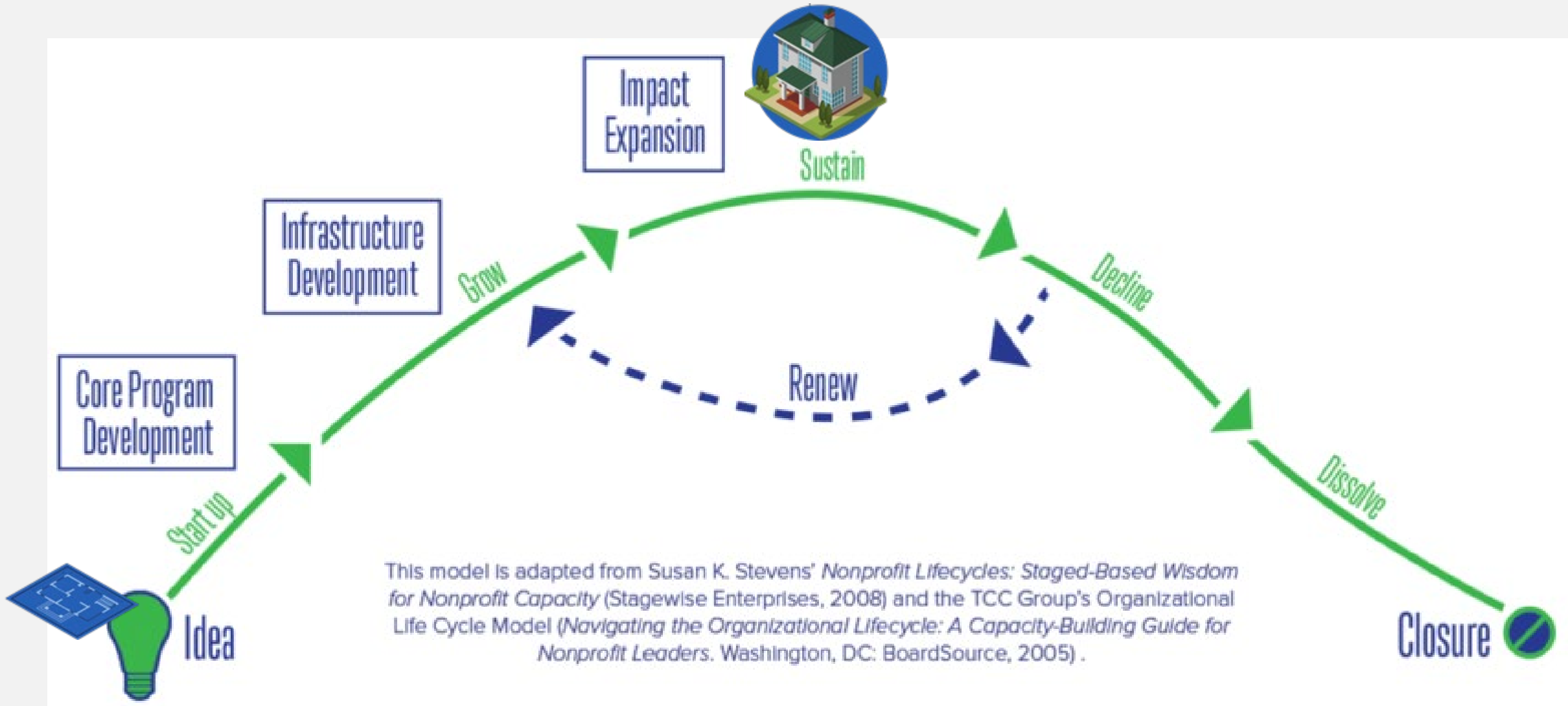
# OVERVIEW

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# Why Strategic Planning?



# Strategic Plan: A Living Document



# What is the Strategic Planning Process?



# What is the Strategic Planning Process?



MESSAGING



STAKEHOLDERS



PLANNING



ANALYSIS



RESOURCES



# What is the Strategic Planning Process?



MESSAGING



STAKEHOLDERS



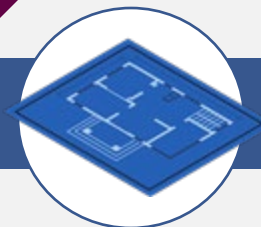
PLANNING



ANALYSIS



RESOURCES



STRATEGIC PLAN



# MESSAGING

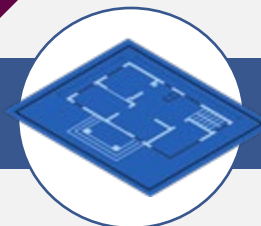
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# What is the Strategic Planning Process?



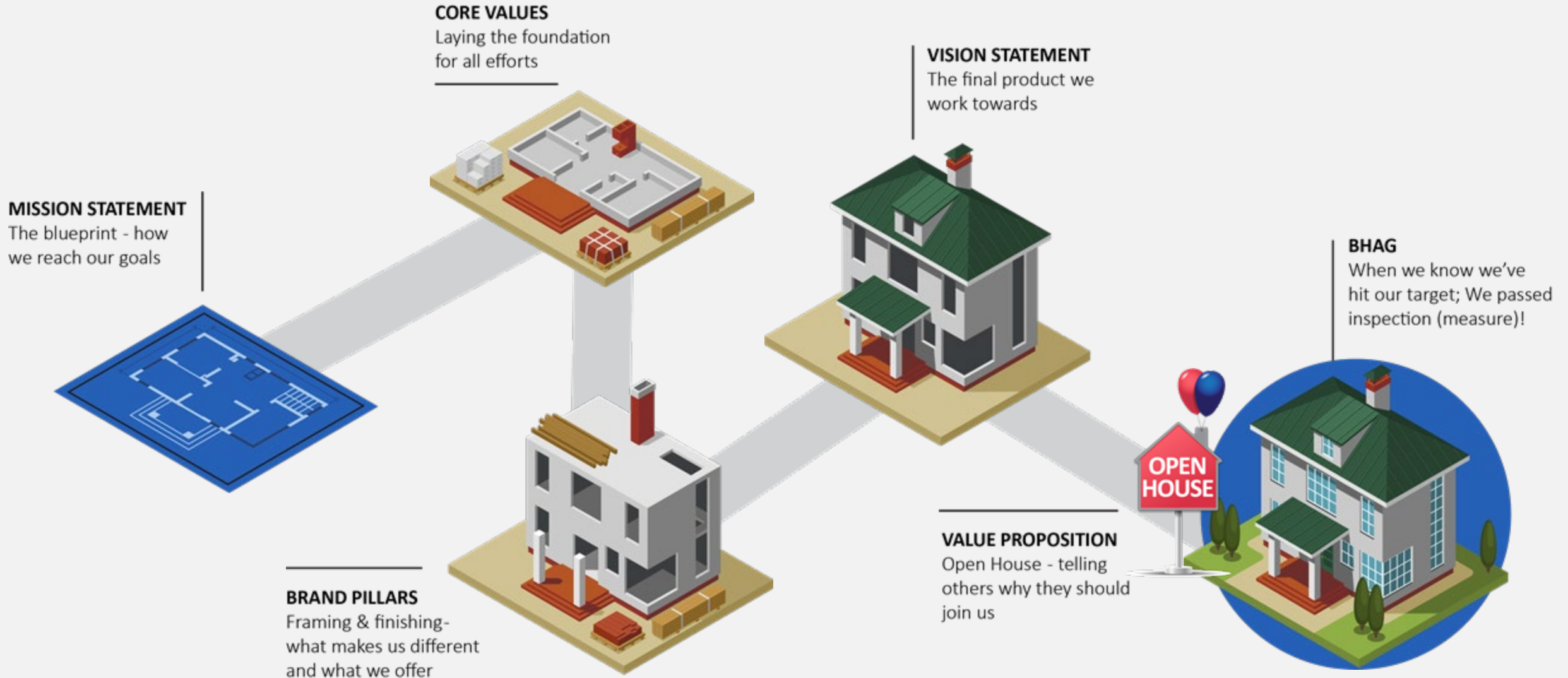
MESSAGING

- Mission
- Vision
- Core Values
- Brand Pillars
- BHAG
- Value Proposition



STRATEGIC PLAN

# Why Messaging?







# STAKEHOLDERS

# What is the Strategic Planning Process?



MESSAGING



STAKEHOLDERS



PLANNING

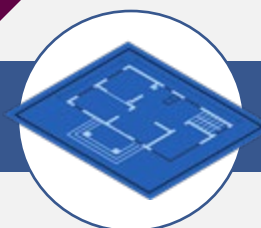


ANALYSIS



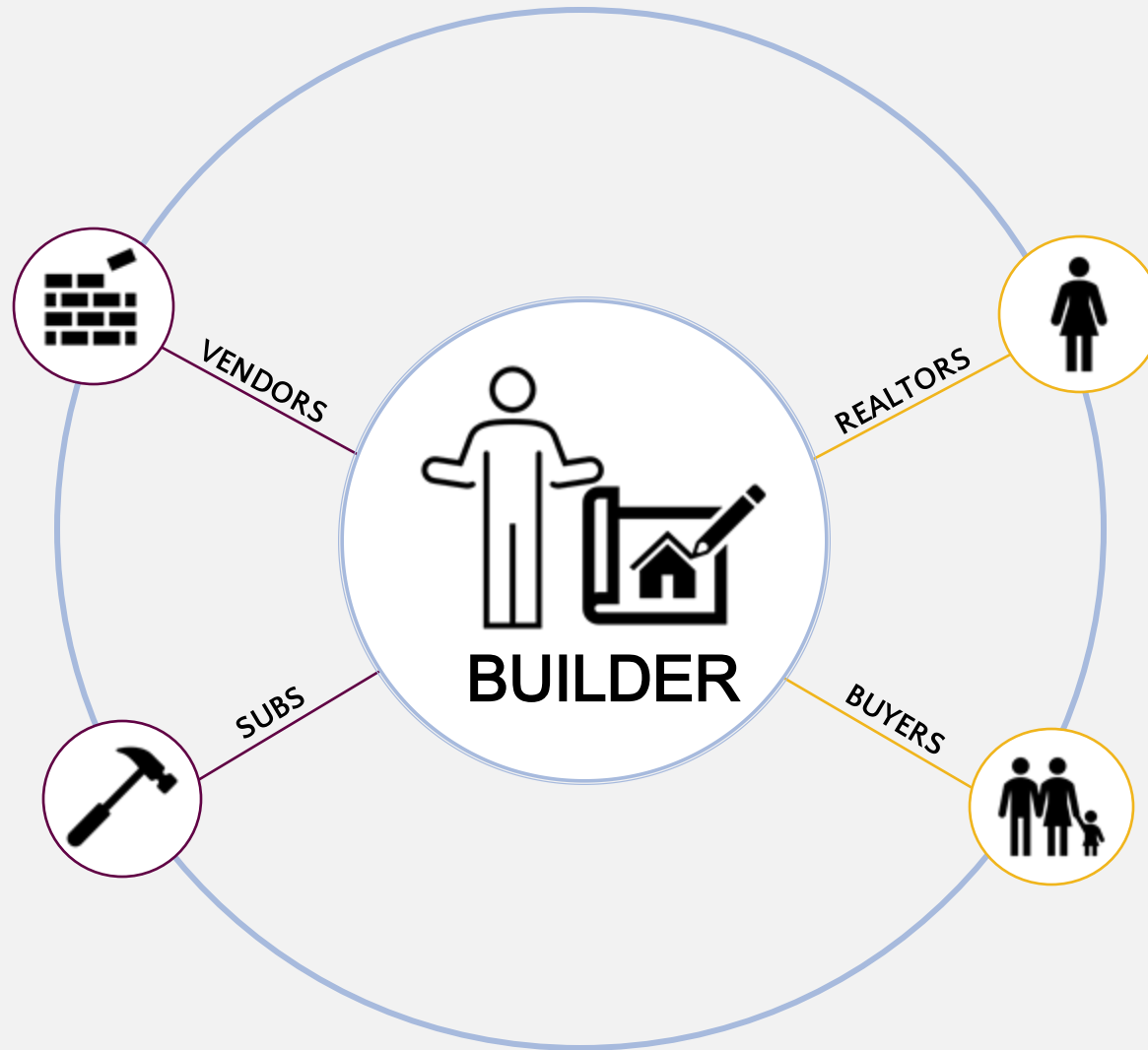
RESOURCES

- Segments
- Sub-segments
- Needs
- Benefits
- Relationship Types



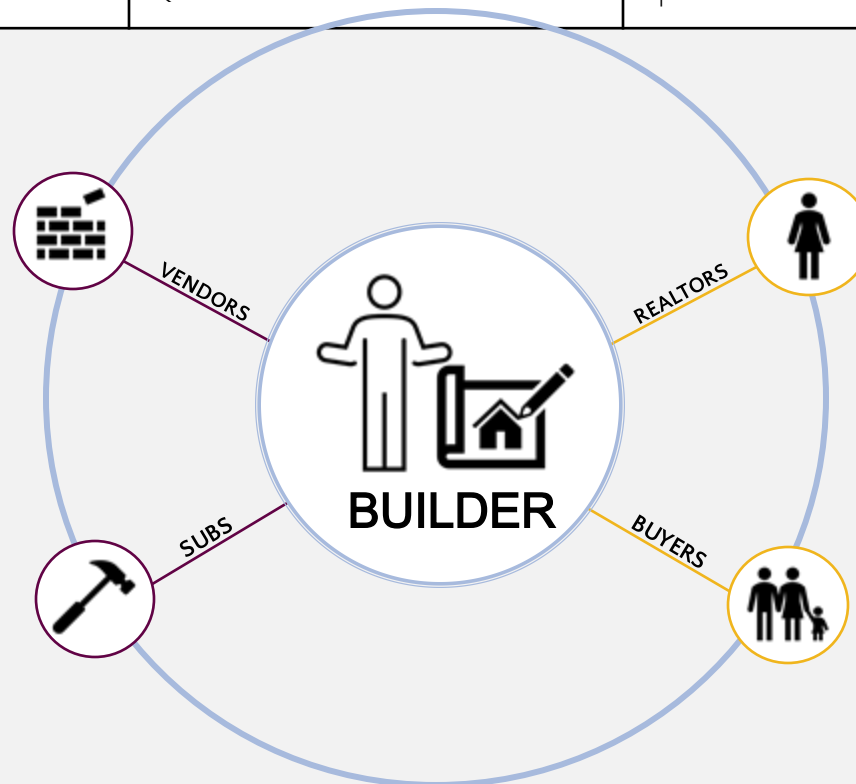
STRATEGIC PLAN

# Why Stakeholders?



# Stakeholder Analysis - Example

Segment: The large groupings of Stakeholders	Sub-segment: Breakdown of the larger Segment	Stakeholder Need (e.g., from a gap or lack of something)	Benefit to Stakeholder: What they want from the builder to fill the need	Relationship Type (get, keep, grow, stop)
Vendors	Brick supplier	Sales/move product	Consistent business	Keep
Subcontractors	Bricklayers	Contracted jobs	Repeat business and referrals	Stop
Realtors	Relocation experts	Options and communication	Commission and customer service	Get
Buyers	Relo professionals	Quick move-in	Spec homes availability	Grow





# PLANNING

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# The Planning Stage



MESSAGING



STAKEHOLDERS



PLANNING

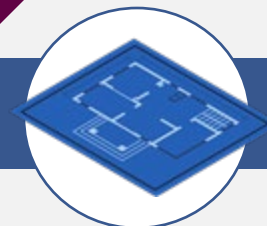


ANALYSIS



RESOURCES

- Goals
- Strategies
- Timeline
- Measures



STRATEGIC PLAN

# Planning: Example

**GOAL:** Hit the center of the target

## STRATEGIES

- Control breathing
- Determine the draw of the string
- Assess the timing for the release

**TIMELINE:** 2 minutes to shoot  
3 arrows (indoor competitions);  
4 minutes to shoot 6 arrows (outdoor).

**MEASURES:** Shoot 72 arrows at the target set 70 metres away, in 12 ends (series) of six arrows. It takes about two hours. They total their points scores, up to a maximum of 720, and are ranked from highest to lowest at the end of the round.





# What's the best goal?

- 1 Start a peer support group by December 2021 that has 12 regular attendees.
- 2 Establish a crossdisability peer support group where consumers develop a support network to reach their goals for greater independence.
- 3 Canvas the community and partner organizations to assess needs and gaps for a peer support group.



# What's the best goal?

- 1 Start a peer support group by December 20 21 that has 12 regular attendees.
- 2 **Establish a cross-disability peer support group where consumers develop a support network to reach their goals for greater independence.**
- 3 Canvas the community and partner organizations to assess needs and gaps for a peer support group.

# Some of the most popular ways to set goals are:

- OKRs (Objectives and Key Results) using Doerr's Goal Formula: *I will (objective) as measured by (key results).*
- SMART goals (Specific, Measurable, Achievable, Realistic, and Timely)
- ACES (Achieve, Conserve, Eliminate, Steer Clear)





# ANALYSIS

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# Strategic Planning Process



MESSAGING



STAKEHOLDERS



PLANNING

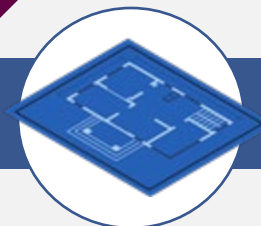


ANALYSIS

- Market Research
- SWOT Analysis



RESOURCES



STRATEGIC PLAN



# What is Market Research?

- Define the Goal
- Assess Research Need
- Determine the Research Approach
- Collect Data
- Analyze Data
- Communicate Findings

# What is a SWOT Analysis?



© The Balance



# RESOURCES

# Strategic Planning Process



MESSAGING



STAKEHOLDERS



PLANNING

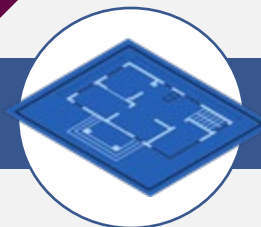


ANALYSIS



RESOURCES

- Money
- People
- Time
- Assets



STRATEGIC PLAN





# What are our resources?



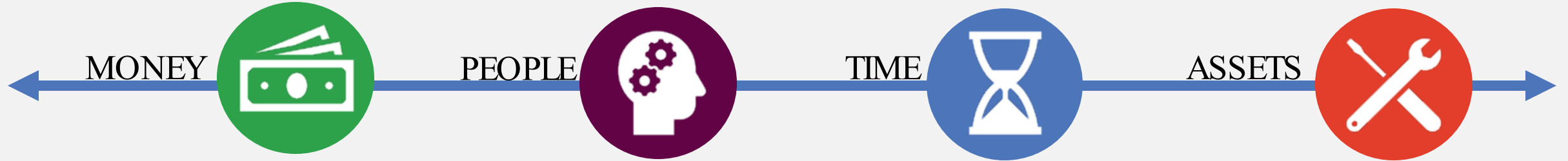
- What budget do you need to complete the goal?
- Does your current budget contain any of the projected costs?
- If the goal isn't revenue producing, where will the money come from?

PROJECT FUNDING REQUEST/BUDGET				
2021 Goal #1: To reach more people with GRIT				
	YEARLY PROJECT COSTS			
	Year 1	Year 2	Year 3	Total
PERSONNEL COSTS	FTE			
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
Salary totals	\$ -	\$ -	\$ -	\$ -
BENEFITS COSTS				
Faculty @ 32.5%				\$ -
Staff @ 38%				\$ -
Part-time <.50 FTE faculty/staff (17.1%)				\$ -
Students @ .30%				\$ -
Benefits totals	\$ -	\$ -	\$ -	\$ -
TRAVEL EXPENSES				
Domestic				\$ -
International				\$ -
Travel totals	\$ -	\$ -	\$ -	\$ -
OTHER PROJECT COSTS				
Materials & Supplies				\$ -
Software				\$ -
Contractors				\$ -
Fees				\$ -
Marketing Materials				\$ -
Other Costs totals	\$ -	\$ -	\$ -	\$ -
OTHER COSTS (NOT SUBJECT TO F&A)				
Student Tuition				\$ -
Participant costs (for trainings)				\$ -
Facility use fees				\$ -
Other Non-F&F Costs totals	\$ -	\$ -	\$ -	\$ -
MODIFIED TOTAL DIRECT COSTS	\$ -	\$ -	\$ -	\$ -
PROJECT COSTS	\$ -	\$ -	\$ -	\$ -
F&A (INDIRECTS), IF APPLICABLE (for GAR)	\$ -	\$ -	\$ -	\$ -
TOTAL PROJECT COSTS (WITH F&A)	\$ -	\$ -	\$ -	\$ -
EXPECTED REVENUE/OFFSET (IF APPLICABLE):	\$ -	\$ -	\$ -	\$ -
PROJECTED NET BALANCE	\$ -	\$ -	\$ -	\$ -
% OF EXPENSES TO REVENUE	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

PROJECT FUNDING REQUEST/BUDGET				
2021 Goal #2: Expand Trauma Training and Education Offerings				
	YEARLY PROJECT COSTS			
	Year 1	Year 2	Year 3	Total
PERSONNEL COSTS	FTE			
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
Salary totals	\$ -	\$ -	\$ -	\$ -
BENEFITS COSTS				
Faculty @ 32.5%				\$ -
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TRAVEL EXPENSES				
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OTHER PROJECT COSTS				
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Participant costs (for trainings)				\$ -
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MODIFIED TOTAL DIRECT COSTS	\$ -	\$ -	\$ -	\$ -
PROJECT COSTS	\$ -	\$ -	\$ -	\$ -
F&A (INDIRECTS), IF APPLICABLE (for GAR)	\$ -	\$ -	\$ -	\$ -
TOTAL PROJECT COSTS (WITH F&A)	\$ -	\$ -	\$ -	\$ -
EXPECTED REVENUE/OFFSET (IF APPLICABLE):	\$ -	\$ -	\$ -	\$ -
PROJECTED NET BALANCE	\$ -	\$ -	\$ -	\$ -
% OF EXPENSES TO REVENUE	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

PROJECT FUNDING REQUEST/BUDGET				
2021 Goal #3: Grow Peer Support Programs				
	YEARLY PROJECT COSTS			
	Year 1	Year 2	Year 3	Total
PERSONNEL COSTS	FTE			
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
Salary totals	\$ -	\$ -	\$ -	\$ -
BENEFITS COSTS				
Faculty @ 32.5%				\$ -
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PROJECTED NET BALANCE	\$ -	\$ -	\$ -	\$ -
% OF EXPENSES TO REVENUE	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

# What are our resources?



- Support staff have their own goals and responsibilities. Have you coordinated with them?
- Do you need to outsource?
- Does your team have the talent (KSAs) needed to complete the goal successfully?

# What are our resources?



- What percentage of time will it take for you and the other stakeholders to get the goal started?
- What percentage do the ongoing responsibilities take?
- Do you need to move some goals to other years?



# What are our resources?



- Are there any software or hardware necessities to meet your goals?
- Are there any other assets you need?
- Do you have the budget for them?

# Why look at resources?

- 1 Make sure our goals are SMART.
- 2 Determine what our strengths are so we can play to those.
- 3 Determine what potential threats we might face so we can plan ahead to make sure those don't sabotage our efforts.

# Strategic Planning Chart: Outputs



## MESSAGING

- Key Statement Document



## STAKEHOLDERS

- Stakeholder Map



## PLANNING

- Goals for Fiscal Planning Year



## ANALYSIS

- SWOT Analysis



## RESOURCES

- Financial Dashboard
- Project Management Plan



# DUST PREVENTION PLAN

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# Which ones HAVE to be done this FY?

FY	Q1	Q2	Q3	Q4	Measures
Goal 1	Strategies	Strategies	Strategies	Strategies	Q1: Q2: Q3: Q4:
Goal 2	Strategies	Strategies	Strategies	Strategies	Q1: Q2: Q3: Q4:

# Vetting Each Goal

FY	Q1	Money	People	Time	Assets	Q2	Q3	Q4	Measures
Goal 1	Strategies					Strategies	Strategies	Strategies	Q1: Q2: Q3: Q4:
Goal 2	Strategies					Strategies	Strategies	Strategies	Q1: Q2: Q3: Q4:

# Strategic Planning Quarterly Meetings

Date	Action Item	Responsible Party
	Distribute final Strategic Plan documents	
	Meet to prioritize goals and introduce the quarterly goal planning process	
	Quarterly goal coaching sessions	
	Q1 goals emailed to those leading the Strategic Planning process	
	Q2 goals emailed to those leading the Strategic Planning process	
	Q1 goals review/Q2 goals discussion meeting	
	Q3 goals emailed to those leading the Strategic Planning process	
	Q2 goals review/Q3 goals discussion meeting	
	Q4 goals emailed to those leading the Strategic Planning process	
	Q3 goals review/Q4 goals and next year's Fiscal Year annual planning meeting	
	Q1 goals for next FY emailed to those leading the Strategic Planning process	
	Q4 goals review/Next Fiscal Year annual planning determined	

# START BUILDING!





# APROSAE

*Strategic Planning and Marketing  
for Independent Living*

***Free 30-  
minute  
consultation***

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