

Top Ten Ways to Use Your Strategic Plan



#1 Decisions

If a new idea arises, or a problem needs to be solved, start with your strategic plan.

Most of us in the non-profit sector want to do what's right for the people and causes we are trying to serve. Saying no isn't always easy. A Strategic Plan helps everyone involved understand what the best decision is, helping make sense of the priorities that key stakeholders helped create. If we know what the goal is, it's easier to decide how to get there.

Where is your organization headed? Having the goal in your sights means when you get blown off course anyone involved can help navigate back. If players don't know where the organization is headed, how can they help navigate the rough waters? There are always rough waters.

#2 Direction

If there is a conflict, disagreement or unexpected change in circumstance, start with your strategic plan.

#3 Oversight

If the Board wants to be sure the organization is on track without micro-managing, start every board meeting with your strategic plan.

The Board exists to represent the interests of the beneficiaries of the organization by ensuring appropriate resources – human and financial – are in place and sustainably utilized to achieve the organization's vision and mission. By necessity, the management and operations of the organization are delegated to an Executive Director or other senior staff member or team.

Donors and funders want to contribute to something meaningful. They will only contribute to causes, projects and people they believe in. If you can't explain your vision - whether in the elevator, the direct mail letter or the grant proposal - they can and they will pick a different organization.

#4 Fundraising
If you want to bring in money, start with your strategic plan.

#5 Employee Engagement
If you want to recruit the best staff possible - and keep them - start with your strategic plan.

Why should anyone work for your organization? Why should they stay? Jobs aren't always about money and for non-profits it's almost always about the goals as well as the income. So how do you expect to recruit and retain staff if you don't articulate the goals?



Evaluation is the key to an organization's success. Not because without it you couldn't succeed, but because without it you can't possibly know if you did! The key to your home doesn't create your home, but without the key you most certainly won't get to enjoy it.

#6 Evaluation
If you want to know how you've done, whether or not you have succeeded, start with your strategic plan.

#7 Short-term planning
If you want to know what you are doing when you engage in activities for the organization, start with your strategic plan.

What do you intend to spend the next month doing? How about the next six months? Some people are happy to wander along through life and work without wondering about their existence, but organizations only exist for a purpose. You are wasting everyone's money and time if you don't have a reason for your daily, monthly and annual activities. Why call a Board meeting if no one cares what an organization is spending its money and time doing?

How can an organization divide the work? What skills and education should you invest in? When it's clear what you need to accomplish, one of the tools you have at hand are the human resources. But knowing how to deploy them takes some strategic thinking.

#8 Job Descriptions
If you are recruiting staff or volunteers, start with your strategic plan.

#9 Performance Evaluation
If you want to know how your ED is doing or you want to the Board to execute their role effectively, start with your strategic plan.

It's always hard for Boards to assess how their ED is doing, but unless you have no paid staff it is central to the Board's obligations. And it's hard for ED's to tell their Boards to step up more effectively. Having goals in place creates clarity. It means the ED knows where to steer the ship and keeps the Board from grabbing the wheel at the wrong moment. It means someone can take the wheel when the ED can't. It means leadership can be shared and obligations can be met.

However you define community – your clients, neighbourhood, members or fellow organizations – getting others on board needs shared vision. Do the people, organizations and institutions support your vision? Do they know your vision? Have they even heard of your organization?
It's hard to achieve anything by yourself.

#10 Community Engagement
If you want external stakeholders to connect with and advance your cause, start with your strategic plan.

