

**DNR/CDB
MACD and MCDEO
Present:
DIY Strategic Planning
2024**



Sage 4 Success, LLC
Nonprofit Consulting
practical, effective & experienced

**Presented by
Terry Profota, MNM**

WE WILL COVER.....

- **Some strategic planning basics.**
- **Why you would decide to DIY.**
- **Four steps to crafting a DIY Strategic Plan.**



WHAT IS STRATEGIC PLANNING?



- Time for discussion
- Envisioning the future
- Identifying and addressing issues
- Building consensus

WHAT IS A STRATEGIC PLAN:

Road Map for Success

- **Clear Expectations**
- **Structures for Consistency**
- **Systems for Accountability**



WHY DIY?

- **Size and scope of your CD**
- **Time commitment**
- **Lack of engagement**
- **Available Funding**

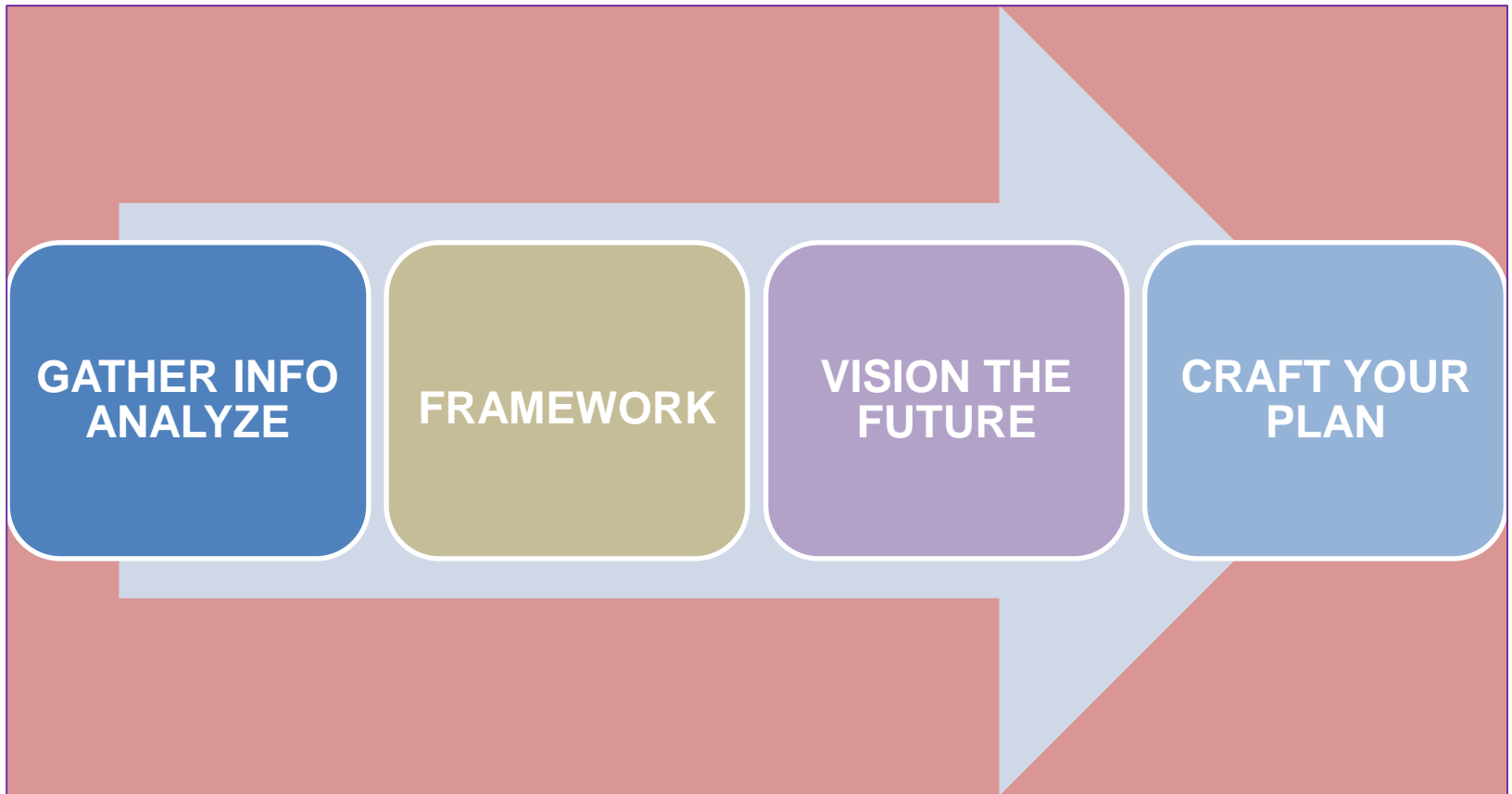


BEFORE YOU GET STARTED?

- **Who will participate?**
- **How much can be allocated to the process?**
- **Plan time frame? 3-5 years?**
- **When do you want the planning document complete?**



Four Steps to DIY Planning



STEP #1: GATHER INFO & ANALYZE



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Worth the time!



STEP #1: GATHER INFO & ANALYZE

Ways to gather feedback and get people thinking.

- **Survey or Questionnaire**
- **DNRC/CDB Strategic Planning Worksheet**
- **Group discussion during a work session**



STEP #1: GATHER INFO & ANALYZE

**Continue to
do?**

Do better?

Stop?

**Legal
compliance?**

**Outside
influences?**

Values?

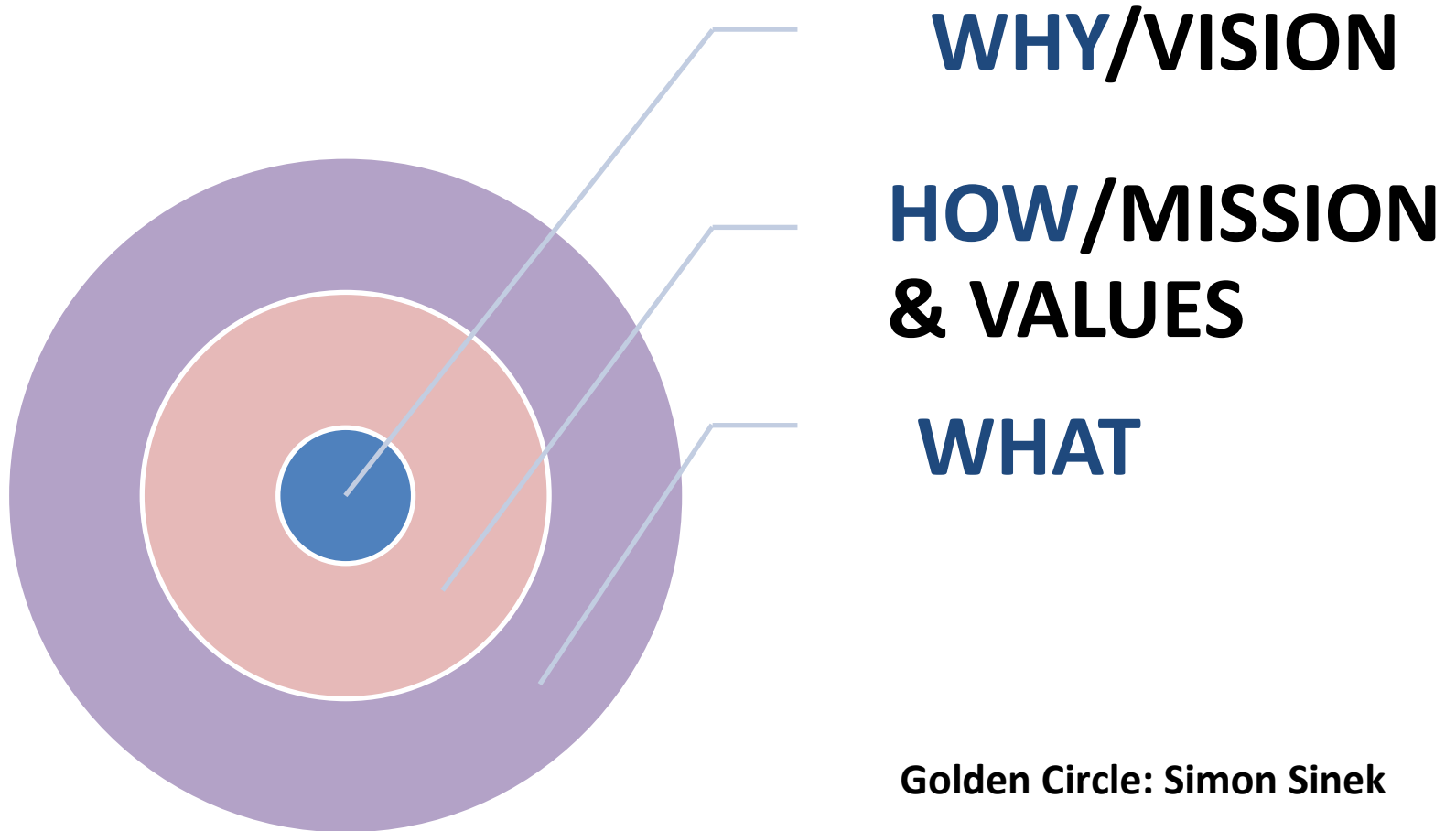
**Identify the
Future?**

STEP #2: ARTICULATE YOUR FRAMEWORK



STEP #2:

ARTICULATE YOUR FRAMEWORK



Golden Circle: Simon Sinek

STEP #2: ARTICULATE YOUR WHY

WHAT IS OUR VISION?

- Why do we exist?
- What do we ultimately want to accomplish?
- What will be our long-term impact?



STEP #2: ARTICULATE YOUR HOW

WHAT IS OUR MISSION?

- How do we make our vision a reality?
- What will we be doing?
- What are our main activities/focus areas?



STEP #2: ARTICULATE YOUR HOW

WHAT VALUES?

- How do we act?
- How do we treat each other?
- What do we want our community and partners to say about us?



STEP #3: VISION YOUR FUTURE



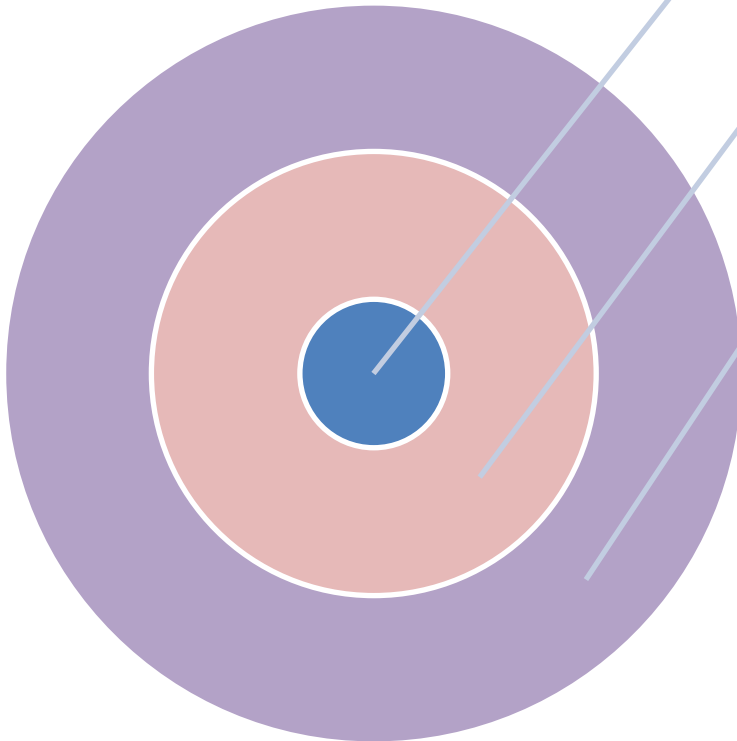
STEP #3: VISION YOUR FUTURE



WHY

HOW

**WHAT/PRIORITIES
& STRATEGIES**



STEP #3: VISION YOUR FUTURE

DEFINE YOUR STRATEGIC VISION BEYOND WHAT CURRENTLY DOING

- What expansion will we undertake in our capacity and programming based on the influx of money?
- What will we be doing in the next 3-5 years?



STEP #3: VISION YOUR FUTURE

PRIORITY AREAS TO BUILD CAPACITY

Programming, Education and Outreach

What else?

- People
- Infrastructure
- Partnerships and Community
- Public Policy



STEP #3: VISION YOUR FUTURE STRATEGIES, DEFINED OUTCOMES.



PEOPLE

- Supervisors
- Staff
- Volunteers

PROGRAMMING, EDUCATIONS & OUTREACH

- List each initiative and define the strategy/outcome you want to achieve.

STRUCTURES & SYSTEMS

- Financial Management
- Policies and Procedures
- Funding

STEP #3: VISION YOUR FUTURE STRATEGIES, DEFINED OUTCOMES.



PARTNERSHIPS & COMMUNITY RELATIONS

- Government Agencies
- Conservation Districts
- Nonprofits
- The Public

PUBLIC POLICES

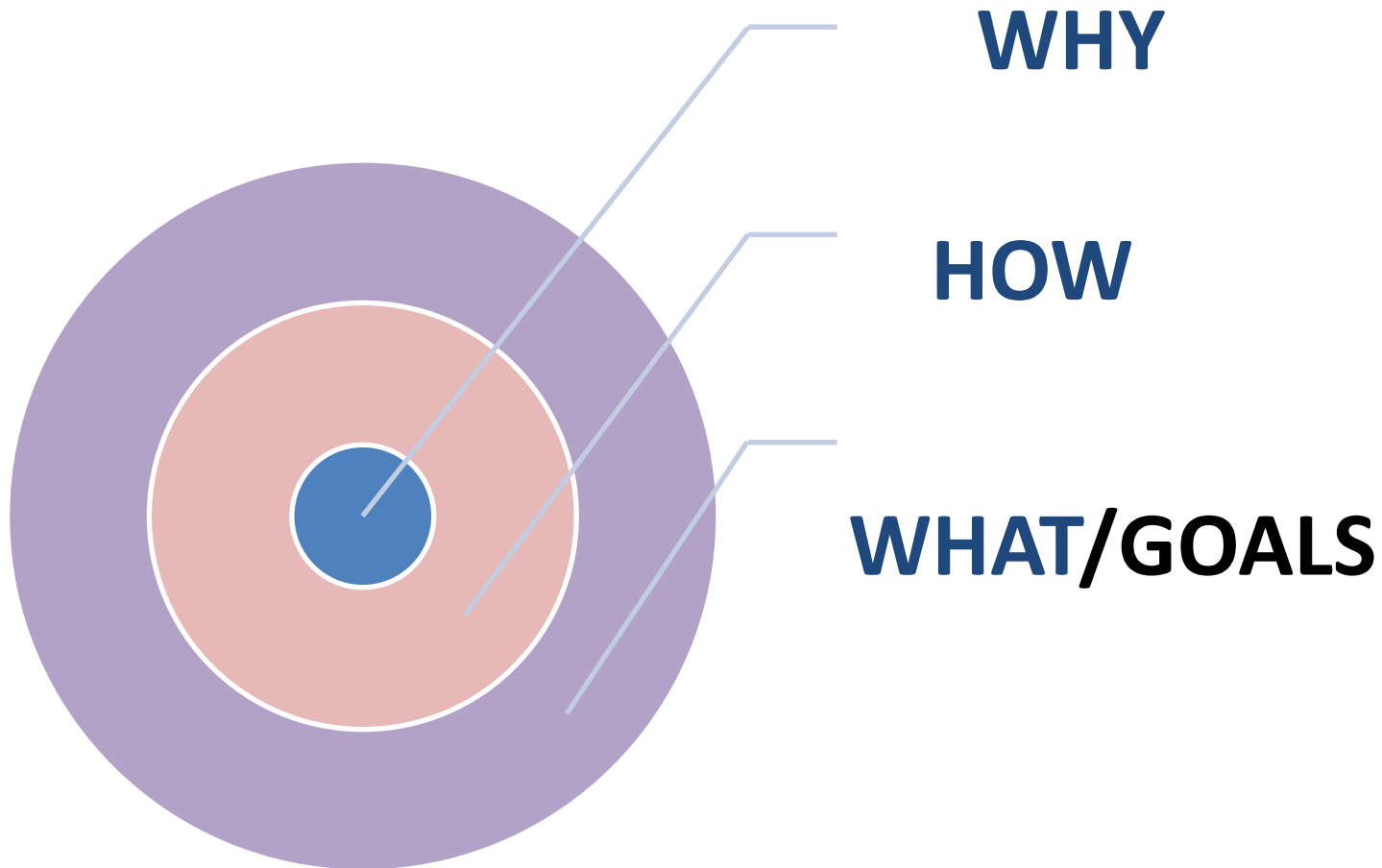
- Networking
- Advocacy

STEP #4: DOCUMENT THE PLAN



STEP #4: CRAFT THE PLAN

BRINGING IT ALL TOGETHER



STEP #4: DOCUMENTING THE PLAN

GOALS – ACTION STEPS, THE FOUNDATION FOR ACCOUNTABILITY.

- **Develop goals for each strategy.**
- **Review annually and update/modify as needed.**
- **Goals move to annual operational plans.**



STEP #4: DOCUMENTING THE PLAN

AN ANNUAL OPERATIONAL WORK PLAN- USE IT OR LOSE IT

- Developed by staff.
- Delegates responsibilities.
- Approved by Supervisors.
- Reported on quarterly. Reviewed & approved by Supervisors.
- Base for annual performance evaluations.



JUST TO RECAP. WE COVERED:

- **Some strategic planning basics.**
- **Why you would decide to DIY.**
- **Four steps to crafting a DIY Strategic Plan.**



A STRATEGIC PLAN IS.....

- **Fun and energizing.**
 - **A starting point, not an end.**
 - **A road map for success.**
-
- **Clear Expectations**
 - **Structures for Consistency**
 - **Systems for Accountability**



QUESTIONS?



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