



# Are we ready for strategic planning?

Four critical questions for nonprofit leaders to consider before developing a new strategic plan.

# Are we ready for strategic planning?

Strategic planning requires a significant investment of time and resources. It's important to consider the organization's readiness before you begin the process.

Share this document with your Executive Director, Board of Directors or Governance Committee. Use these reflection questions to spark discussion at your next meeting.

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Is our purpose clearly articulated and widely understood?

02

Are we ready to make tough decisions about how to prioritize our resources?

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Do our staff have the capacity to implement a new strategy?

04

Does our organization need a new strategic plan?



# Is our purpose clearly articulated and widely understood?

*Does the organization have a clearly articulated core purpose? Does everyone know what the core purpose is? Does everyone agree that the core purpose is the 'right' focus for the organization?*

## **Why it matters.**

It's common for nonprofit organizations to lack clarity around their core purpose. Without clarity of purpose, people operate on assumptions. It becomes difficult to make strategic decisions. And it's hard to create momentum because everyone is pulling in a different direction. Core purpose is what guides your strategy. Without it, you'll find it difficult to develop an effective strategic plan.

## **Are we ready for strategic planning?**

- We have a clearly articulated core purpose.
- Everyone understands and supports the core purpose.

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### **If not.**

Invest your time and resources on clarifying the organization's core purpose. You may decide to include this work in the first phase of your strategic planning process.



# Are we ready to make tough decisions about how to prioritize our resources?

*Does the organization try to be everything to everyone? In trying to fulfill our core purpose, do we want to 'do it all'? Do we say 'NO' to opportunities more often than we say 'YES'?*

## **Why it matters.**

A strategy is not a list of every possible course of action; it is a carefully considered decision to follow one specific course of action. Every organization has limited capacity and resources. Leaders need to make hard choices about where to focus valuable time, skills, and energy. It's challenging, but necessary to say 'no' to many opportunities if you want to commit to your strategy.

## **Are we ready for strategic planning?**

■ We are ready to reallocate resources to prioritize strategic work.

■ We are comfortable turning down opportunities that don't align with strategic work.

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### **If not.**

Consider revisiting your core purpose. Bringing clarity to your purpose may make it easier to prioritize resources.



# Do our staff have the capacity to implement a new strategy?

*Is there time and space in staff workloads for the 'thinking' and 'doing' work that comes with a new strategy? Do staff have the time and budget to upgrade any necessary skills or knowledge? Do staff have the capacity and autonomy to drive change in administration and operations?*

## **Why it matters.**

You can develop a great strategy, but it won't succeed if staff lack the time, resources or skills to activate it. It's important to consider the organization's current capacity. Many nonprofit organizations run with a small, overworked team. Staff need the time and space to step back from the urgency of day-to-day work to implement a new strategy.

## **Are we ready for strategic planning?**

Our staff have time and flexibility in their workload to activate a new strategy.

Our staff have access to the skills and resources they need to activate our strategy.

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### **If not.**

Delay your strategic planning until you've addressed challenges with staff workload and burnout. Or, consider a full or partial program hiatus to allow staff the time to shift toward a new strategy.



# Does our organization need a new strategic plan?

*Does our organization currently have a strategy in place? Is the current strategy moving the organization toward fulfilling its core purpose? Have there been any significant shifts in our internal or external environment that we need to account for?*

## **Why it matters.**

There's no need to develop a new strategic plan unless you need a new strategy. And having an existing strategic plan with an expiry date is not the same thing as needing a new strategy. Sometimes, you'll need a new strategy sooner than expected. And sometimes, your current strategy will serve its purpose for years to come. If you don't truly need a new strategy, beginning a strategic planning process will create confusion and stall your organization's momentum.

## **Are we ready for strategic planning?**

■ We're not satisfied with our current strategy.

■ We need to adapt to changes to our internal and external environment.

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### **If not.**

Sometimes organizations look to strategic planning to resolve other internal concerns. Consider if there are specific tensions in HR, governance, admin or operations that need attention.



# Checklist:

## *Are we ready for strategic planning?*

- We have a clearly articulated core purpose.
- Everyone understands and supports the core purpose.
- We are ready to reallocate resources to prioritize strategic work.
- We are comfortable turning down opportunities that don't align with strategic work.
- Our staff have time and flexibility in their workload to activate a new strategy.
- Our staff have access to the skills and resources they need to activate our strategy.
- We're not satisfied with our current strategy.
- We need to adapt to changes to our internal and external environment.



# Looking for help with your strategic plan?

## Learn More

Download our brochure to learn more about our approach to strategic planning.

[riseandrun.ca/strategy](https://riseandrun.ca/strategy)



## Book a Call

Schedule a complimentary 30-minute consultation to answer all your questions.

[riseandrun.co/bookacall](https://riseandrun.co/bookacall)



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## Contact us.

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 [info@riseandrun.co](mailto:info@riseandrun.co)

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# Looking for help with your strategic plan?

## *Our approach*

### — Pragmatic and purposeful.

We keep your organization's core purpose at the heart of our process. We'll help you bring clarity and direction to the organization. And we'll map out the specific steps required to put your strategy into action.

### — Rooted in equity, diversity and inclusion.

We weave the values of equity, diversity and inclusion into your strategic planning process. We draw on the Deep Diversity methodology to bring an anti-oppressive lens to our work.

### — Insightful and actionable.

We bring strategic insight, analysis and deep knowledge of nonprofit trends. We work directly with your leadership team to put your plan into action, and monitor progress as you go.

### — Streamlined around your schedule and location.

Our strategic planning process is fully remote. We work with busy schedules, across timezones, and in every location. Our highly participatory process includes both live and asynchronous engagement opportunities.

### — Engaging and energizing.

Our process focuses on critical discussions that truly matter. We use GroupMap, a dynamic online platform for collaboration and organization.



# Looking for help with your strategic plan?

*Our team*



## Nicole Gagliardi

Lead Consultant,  
Governance and Strategy

**Nicole believes that small nonprofits need a new model for success.** Her work brings clarity and structure to complex situations, with pragmatic and effective solutions that work for small organizations.

Known for challenging the assumptions and norms that limit impact and lead to burnout in the nonprofit sector, Nicole has earned a reputation as an innovative and insightful leader in the Canadian nonprofit sector.



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