

GRASSROOTS STRATEGIC PLANNING A NONTRADITIONAL APPROACH

2023

Presented by Orson Aguilar

Sr. Director of Public Affairs, *Oportun*
Organization Strategist & Social Justice Advocate
Past President, *The Greenlining Institute*

Before we start, please make sure to change your Zoom name to your first & last name + your organization name

Ex. "Shy Alderman - OCCUR"

HOW TO CHANGE YOUR ZOOM NAME



- 1) Hover over your video
- 2) Click the 3 dots in the upper right corner
- 3) Click Rename
- 4) Change your full name + organization

A recording of this workshop & the presentation slides will be emailed out to all attendees in few days. They will also be made available on *amodelbiltonfaith.org*

If you did not pre-register for this event & are just showing up, please make sure to drop your email in the chat so we know where to send materials

OCCUR & THE SAN FRANCISCO FOUNDATION

AMBOF PROGRAM TEAM



Dr. David Franklin
President & CEO, OCCUR



Carmen Bogan, MBA
Lead Consultant, FAITHS



Michelle L. Myles Chambers
Director, FAITHS



Sayron Stokes
Program Assistant, FAITHS



Shy Alderman
Operations Manager, OCCUR



Symone Stokes
Admin Assistant, OCCUR



ORSON AGUILAR

Sr. Director of Public Affairs, *Oportun*
Organization Strategist & Social Justice Advocate
Past President, *The Greenlining Institute*

Strategic Planning for Grassroots Non-Profits

Setting Goals & Key-Results

for hardworking and passionate non-profit leaders.

By Orson Aguilar
July 27, 2023

Why do we need a strategic plan in the first place?

Alignment | Efficiency | Impact

Problem

- A glaring lack of alignment.
- Lots of meetings with a lot of wasted time.
- Unable to take advantage of opportunities.
- Organizations lose the forest for the trees.

Solution

- Strong Teamwork and alignment.
- More efficient use of time.
- Take advantage of opportunities.
- Happy staff. Everyone feels valued.
- Greater transparency,

Impact

**More
individuals
and families
served.**

**A Good Strategic
Plan Makes
Everything Easier**

**Fundraising & Proposal
Writing is Easier**

**Tracking Impact is
Easier (Metrics are
proactive and not
reactive)**

Common Elements of The Traditional Strategic Planning Process



Hire a consultant

Tip: Review their work with other non-profits.



Engage Key Stakeholders

Obtain info from all employees, board members, and external stakeholders.



Visualize what success looks like.



Conduct a SWOT Analysis

Tip: See our Hack



Review the Mission and Vision of the Organization



Develop Goals and Objectives

Common Elements of The Traditional Strategic Planning Process (continued)



Write and Publish the Plan



Send to Key Stakeholders



**Develop Systems to
Implement the Strategic
Plan**



Hiring a Consultant for Strategic Planning



**Range \$2,000 -
\$25,000**

**The consultant only facilitates the process.
They do not OWN to process.**

Funders often will provide a grant for strategic planning

Interview 2-3 consultants.

Review their previous Strategic Plans (Are the plans simple to understand?)

Only hire a consultant if the leadership team is fully invested in the process.

Engaging Key Stakeholders and Collect Data



FYI: This can be really time consuming.

It's important to engage all stakeholders in your strategic planning process.

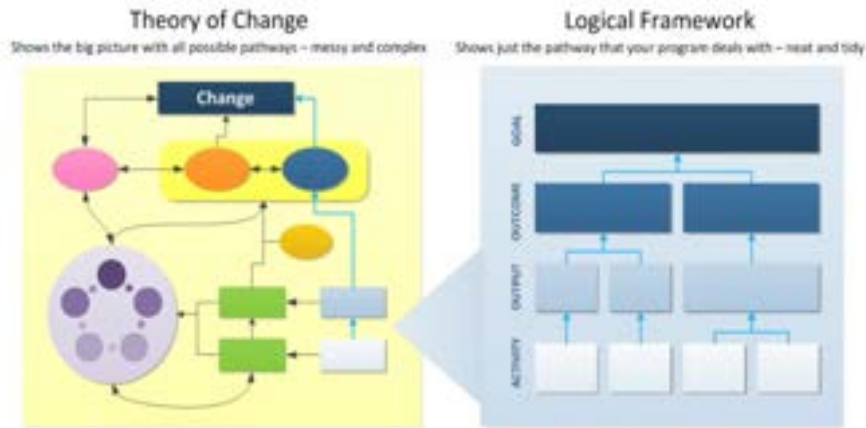
Do you already have data that can be analyzed?

Will you collect surveys from board, staff, and the people you serve?

How many meetings will you have to engage stakeholders?

Take solid notes during this process.

Visualize the change you want to see in the world and how you will impact that change!



Keep it simple

Answer this question:

“If we do **A and **B**, then we get **C**.”**

Visualize what success looks like for your organization.

Keep it simple and internally focused.

Stay focused on the organization..

You cannot control all external factors.

The SWOT Analysis – Do a TOWS instead



Be honest with yourself and create a safe space to obtain honest feedback.

**Threats
(External)**

**Opportunities
(External)**

**Weaknesses
(Internal)**

**Strengths
(Internal).**

The TOWS Analysis (Borrow this hack but add details, and add your own)

Threats (External)	Opportunities (External)	Weaknesses	Strengths
<ul style="list-style-type: none"> • Decline in funding opportunities • Crowded field (other non-profits in the same space) • Funders switch focus areas • The economy slows down • Public opinion changes • High real estate costs • Inflation (everything is more expensive) 	<ul style="list-style-type: none"> • More funders interested in our issue • More collaboration is required by funders • Inflation if falling. • Fewer non-profits in the same space. • Economy gets better. 	<ul style="list-style-type: none"> • No strategic plan • Staff burnout • Low morale • High turnover with staff • Board is not engaged • Funding is low and expenses are high 	<ul style="list-style-type: none"> • Strong history • Passionate team • Positive track record of results • Trust with the community • Strong base of supporters • Diversified funding base • Strong reserves • Good expense management system

Reviewing the Mission and Vision of the Organization



Don't wait for a new mission for you to work on your objectives and key results.

Missions and visions were often written a long time ago. Just changing the mission can take up to a year.

Engage the board. Only boards can change missions.

Unlike Missions, Visions can be more flexible.

Missions should be easy to understand and easy to remember

Do not let an imperfect mission hold you up. Stakeholders care more about your plan!

A Grassroots Strategic Plan (Grassroots OKRs)

Objectives

A measurable aspirational statement meant to inspire action. It's the where you want to go.

Key Results

How you will know if you got there. They are always time bound and include a number.

Why use OKR's? (instead of logic models, KPIs, SMART Goals)

1. OKR's are the most powerful (compared to other tools out there)
2. They encourage collaboration and alignment.
3. They help clarify what's most important to the organization.
4. They also keep team members from wanting to do everything.
5. You can say no when paths don't align.

Example Personal Objectives and Key Results:

OBJECTIVE

- Feel healthy and happy.

Key Results

- Going to yoga 15 times a month.
- Reading a book a month.
- Attend a live music venue once a month and invite **friends**.
- Having dinner with my wife at a new restaurant once a month.

Primary Drivers

- Me

Example Objectives and Key Results:

OBJECTIVE

- Increase our social media engagement by increasing our posts by 100% on each platform (IG, Facebook, Twitter, etc.)

Key Results No more than 5 per objective.

- Launch approximately 15 total combined posts and or stories per month.
- Increase followers on each platform by 500% by year end.

Example Objectives and Key Results:

- **Increase Fundraising by 50%.**

Team	Objective	Key Results	KR Driver	Status
<ul style="list-style-type: none">• Development department	<ul style="list-style-type: none">• Increase fundraising by 50%	<ul style="list-style-type: none">• Get current funders to increase giving by 20%• Meet with at least one new funder per month.• Submit 7 new proposals• Increase annual fundraising event revenue by 25%	<ul style="list-style-type: none">• Name of individual in charge of implementing this objective	<ul style="list-style-type: none">• Update this every three months.

Example Objectives for Grassroots Non-Profit Orgs

OBJECTIVES

1. Grow our impact by reaching more individuals by 100%
2. Increase fundraising by 50%
3. Increase volunteer engagement by 50%
4. Reduce employee turnover by 25%
5. Drive an advocacy agenda that leads to better policies that positively impact our community.
6. Deliver better quality programs that lead to greater client satisfaction by averaging 5 stars in our surveys.

Tips on Developing Objectives



Less is better

Too many objectives distract us.



Make sure they are measurable



Start with the CEO and leadership team.



Make all objectives transparent

Everyone should have access to the organization's OKRs.



Make them living and breathing

It is okay to revise, delete, or add but only after the team discusses and agrees.



Identify the drivers of the objective

What team and what staff members are in charge?

Tips on Developing Key Results



No more than 5 key results per objective



Only add them if you can measure them



Be as specific as possible



Track them every three months



Make them living and breathing

It is okay to revise, delete, or add but only after the team discusses and agrees.



Identify the drivers of the results

What team and what staff members are in charge?

Avoiding the Dust: Developing Systems to Implement the Plan



Develop a system of accountability and stick to it.

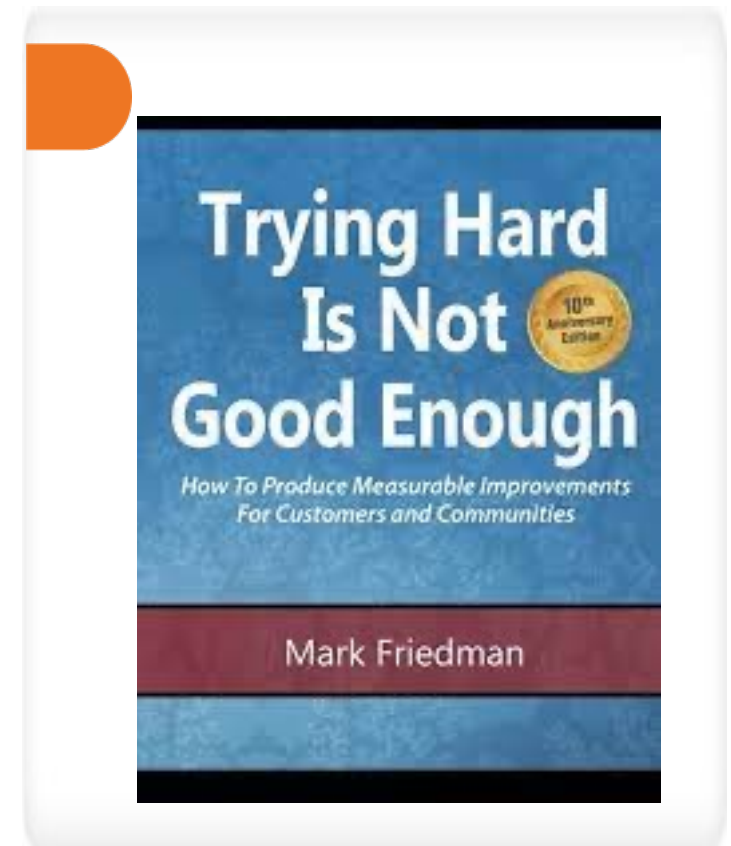
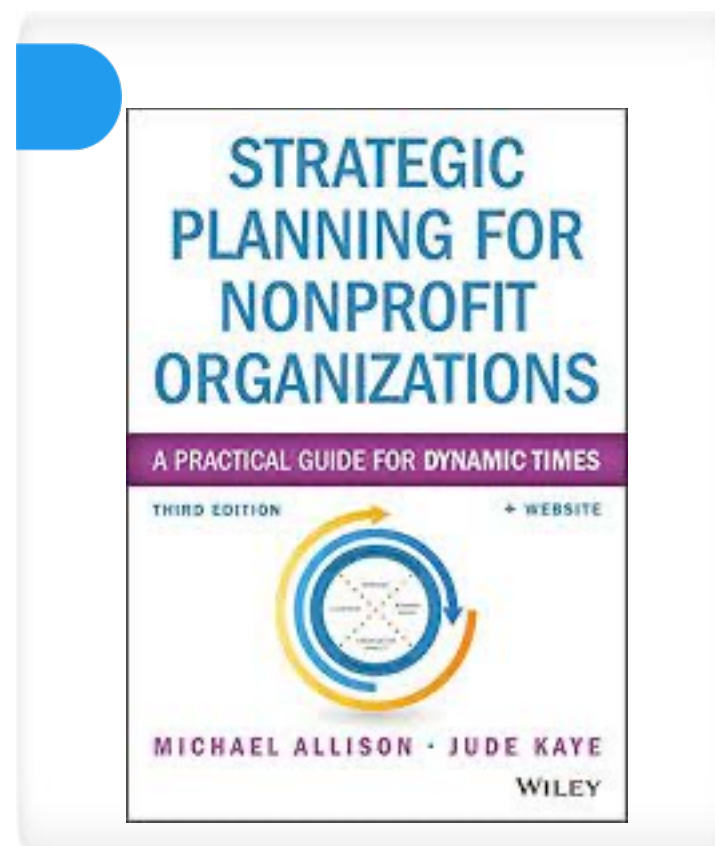
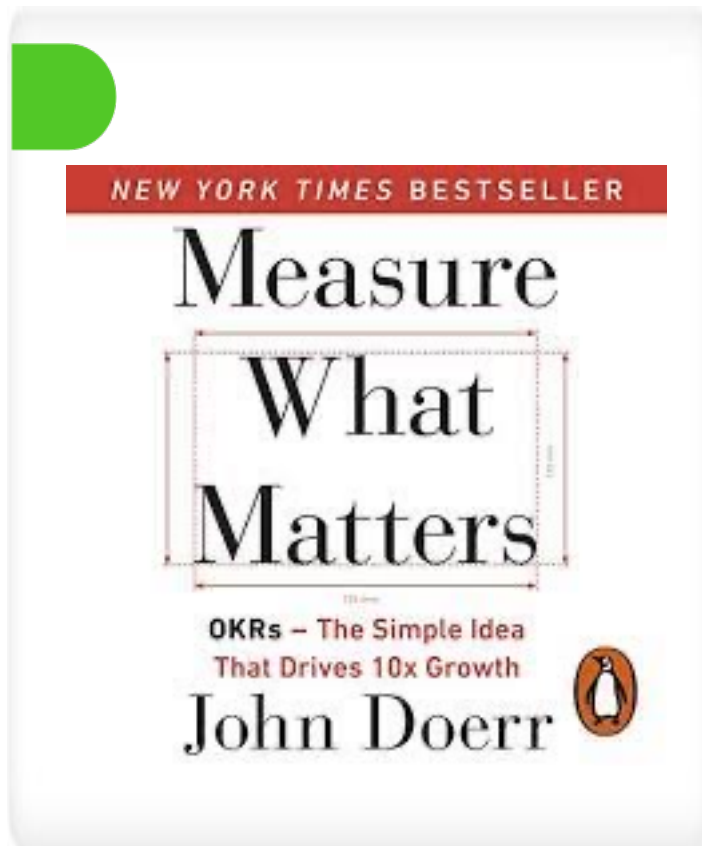
Review the OKR's every three months.

Revise the OKR's as necessary.
Delete the ones that no longer make sense.

Leadership has to champion the OKR's.

Make the necessary major revisions at the end/start of each year.

Additional Resources



Contact:

Orson Aguilar

aguilar.orson@gmail.com

510-552-049

Please join us for a legal clinic next month!

KEY PRINCIPLES OF NONPROFIT LAW 2023 UPDATE

Presented by Karl Mill, Esq.
Founding Attorney, Mill Law Center

To Register, Visit:
AModelBuiltOnFaith.org

SAVE THE DATE
AUGUST 31



THANK YOU FOR COMING!

We'd love your feedback! Please take a moment to fill out our Evaluation Form. Your responses help us to improve programming and maintain funding for A Model Built On Faith. The Evaluation Form will pop up right here in Zoom.

