

Planning to Thrive

“He who fails to plan is planning to fail.” - Winston Churchill

OK, so you are now a state-recognized nonprofit, in some stage of making the world a better place. That in itself is a milestone to celebrate! What must you do to flourish and thrive?

First of all, there are some essentials that should have been there to get you this far. And if you’ve done the paperwork, you should have at least:

- ❖ A Mission, a statement rooted in your purpose
- ❖ A Vision of what a better world looks like -- this is your destination.
- ❖ Whether you know it or not, your actions are shaped by your Values. Know the Values by which you live by. Bring people on board who share the same Values.

What next?

PLAN – DO – STUDY – ACT Cycle

PLAN: Capture it!

1. **Write your Strategic Plan:** articulate and capture your foundational essentials – in writing!
 - ❖ Mission, Vision, Values
 - ❖ Strategic Roadmap (your Voyage Plan)
 - ▶ Your Goals and Milestones
 - ▶ A Timetable
2. **Write Your Business Plan** -- a year-to-year Plan to manage meeting your nonprofit goals.
 - i. Set yearly objectives to meet the longterm goals on your Roadmap.
 - ii. Establish how you measure accomplishing yearly objectives, and impact.

DO: Make it happen! Execute the plan. Operate according to plan.

1. Plan your Year’s “trip”.
2. Launch your trip.
3. Monitor your progress.
4. Make adjustments.
5. Stay on course.
6. Arrive at your destination.

STUDY: Continually scan and assess your internal & external environment – annually at minimum. Be aware.

- Know thyself: your strengths and weaknesses
- Know your “competition”
- Know the regulatory landscape
- Identify opportunities and threats

CHECK Yearly Plans for:

Alignment

- ☞ With your Purpose and Mission
- ☞ With your Roadmap (strategic Goals)
- ☞ With your Values
- ☞ With your Priorities

- What are your priorities this year? Are they aligned with your strategic goals?
- Is your funding plan aligned with your goals and priorities?
- How are your programs aligned with your mission?
- What are the measures by which you determine you are achieving your yearly objectives?
- What are the measures by which you assess your organization's impact?

Compliance

- ☞ With your legal responsibilities
- ☞ With your fiduciary obligations (duty of care, loyalty, obedience)
- ☞ With regulatory and reporting requirements

- Do you, your board and your staff understand the risks of non-compliance?
- What steps are you taking to ensure compliance?
- Do you conduct an audit of your nonprofit on a regular basis?

ACT: Take action to improve your process and plans as part of a continuous learning cycle in your organization. Standardize best practices.

1. In the past year, what worked well?
2. What didn't work well?
3. What can we improve or change for the better?



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