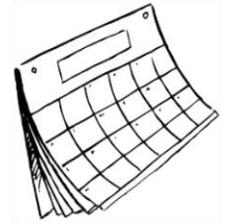


# Strategy Snapshot: Survey Results

We asked nonprofits about their experience with strategy development and strategic planning to find out what is working, and what we could all do better. Here's what they had to say.\*

## Process



### Frequency

Many adhere to a traditional 3-5 year planning cycle, but a number are developing strategy on an as-needed basis.

**49%** plan every 3-5 years, like clock work

**34%** plan when they think their current plan needs to be refreshed

**15%** do annual plans, not multi-year plans

**2%** develop plans when a funder asks

### Time Investment

Most planning processes took between 3 to 9 months.



### Participation

Executive or senior staff are usually in the room, and board participation may be either a subset or the full board.

**50%** involved other program and operations staff or volunteers

**32%** included clients or other community members

**63%** used a third-party facilitator or consultant

### Activity

The most common activities include assessing challenges/opportunities, trends, competitive landscape, and capacity.

**69%** reviewed or updated program offerings

**67%** assessed community needs or demand for services

**65%** reviewed the current financial model and/or revenue mix



\*156 respondents were asked multiple-choice questions: *How often does your organization do strategic planning? How long did it take to create your most recent strategic plan? Who was involved in a substantive way (i.e. in the room) in developing the plan? and What activities did the strategic planning process include?*

# Strategy Snapshot: Survey Results

## Outcomes



### Utility\*

Strategic plans have been most useful in creating a shared vision, providing a basis for operational planning, and tracking progress to ensure accountability.

### “Our strategic plan would be more useful...”

Written responses to this question clustered into three main areas of need:

#### 1. Implementation

Roughly one-third of comments indicated the desire for better ability to keep the plan top-of-mind and at the forefront of decision making, to track and monitor success, and to use it to ensure accountability for results.

*...if implementation efforts were reviewed more regularly*

*...if we could align strategic imperatives & operating priorities to achieve our overarching mission goal*

*...if it was really used to drive everything we do!*

#### 2. Participation and Buy-In

The second most common theme was that of the need to build and maintain greater buy-in across the organization. Notable among these comments were a number that specified a desire for greater board participation and ongoing engagement. A few also specified interest in more effective engagement of community stakeholders.

*...if it was owned even more deeply in our organization*

*...if we had included more community members and board members in the creation*

#### 3. Quality and Content

Another cluster of comments indicated desired of improvement in the collection, analysis, and use of data (including market assessment, competitor analysis, and financial projections), as well as the depth and quality of strategic thinking and more time to devote to the process.

*...if we had a system for gathering the information needed to make the best decisions.*

*...if we had a better handle on competition*

*...if it had fewer components and boxes to check and was more substantive, flexible, and meaningful*

