



Strategic Planning Prep Service Grant



The Strategy Management Practice is presented by Wells Fargo.



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Outline

- Strategy Management
- How does the Strategic Planning Prep Service Grant fit in?
- Why do a Strategic Planning Prep Service Grant?
 - Value proposition
- What are the deliverables and what is considered in scope?
- What is not in scope for this Service Grant?
- What are the criteria to qualify for this Service Grant?
- Process
 - Key milestones
 - Pro Bono Consultant team
 - Project management and tools
 - Timeline

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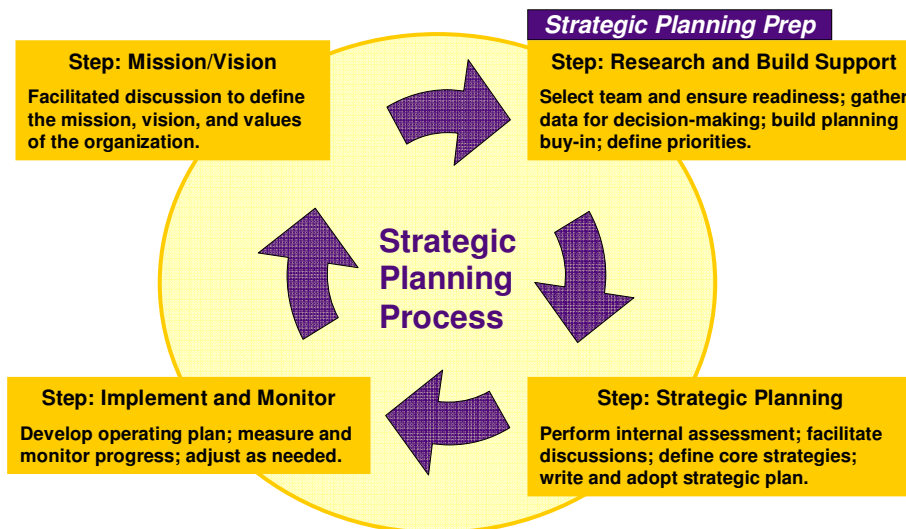
Strategy Management

- **The Purpose:**
 - Help organizations thoughtfully explore their environments as well as their own internal strengths and weaknesses
 - Monitor and measure progress towards an organization's defined strategic objectives
 - Facilitate decision-making among key stakeholders
- **The Result:**
 - Detailed data collection and analysis, which provides contextual information the organization needs to make good strategic decisions
 - Established common terminology around organization's strategic goals and objectives
 - Framework for describing strategic execution

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The Strategic Planning Process



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Why do a Strategic Planning Prep Grant?

You have questions about your environment:

- Is my client base changing in ways that will affect our services?
- What are other organizations doing to address the funding crunch?
- Are critical foundations starting new initiatives that could leave us behind?
- What topics are currently motivating volunteers?
- Are my peers succeeding with the new technology we've been hesitant to try?
- Will recent giving trends persist, or will there be another shift?

You have problems with stakeholders:

- Board members don't understand your direction.
- Staff members question why you're making changes.
- Funders want to see the data behind your decisions.

What you don't know can hurt you. A Strategic Planning Prep Service Grant helps a nonprofit make data-driven decisions.

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Strategic Planning Prep Value Proposition

What does a Pro Bono Consultant team accomplish through this grant?

- **Take a good look around**
 - Provide an expansive, detailed picture of the environment you operate in, from client trends to funder priorities
- **Align internal stakeholders**
 - Conduct internal interviews to elicit key opinions and build a common understanding
- **Reach external stakeholders**
 - Conduct external interviews, which may pave the way for future research or collaboration
- **Analyze the implications**
 - Map external factors to organizational capacity and highlight the implications of what was learned

Why is this important?

The Strategic Planning Prep Service Grant provides a detailed map of your organization's situation, position, and potential to better inform your strategic decisions and understanding of the environment in which you operate.

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Activities in Scope

The grant scope includes:

- **Interviews** with internal stakeholders and external subjects
- **Other discovery** (e.g. trend information from industry journals and conference notes; competitive information from annual reports, newsletters, financial statements, and program reports; client trends from census and other government data; existing evaluation data or surveys)
- **Deliverables:**
 - ➔ **Preliminary findings** that present information from first half of External Interviews and outline a direction for the remainder of the environmental scan
 - ➔ **Environmental scan** that looks at organization's current market situation along with forecasted upcoming changes; review competitors; assesses external events, conditions, and trends that could affect the organization's success
 - ➔ **Opportunity map** that takes an objective view of organizational strengths and weaknesses, then maps to external factors to rate specific opportunities and threats (**SWOT analysis**)

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Activities that are not in scope

- Strategic planning, including creating or updating a strategic plan
- Strategic recommendations
- Organizational assessment
- Mission, vision, and values exercise
- Formal board or staff training
- More than 20 total interviews, focus group or survey research (including survey creation or implementation)

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Grant Criteria

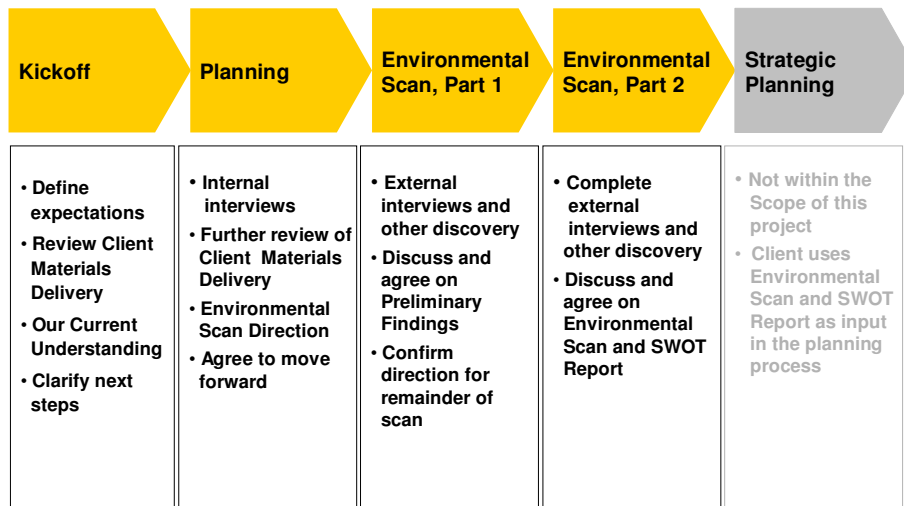
We recommend you apply if your organization has:

- A clear sense of mission and vision
- Either just completed or will soon complete the current strategic plan, or has another strategic need for contextual information
- Resources and staff/board alignment needed to enter into a strategic planning or other key lifecycle moment in roughly 9 months to 1 year from time of application
- Staff who can invest the necessary time to make the project succeed:
 - Executive Director: 1 to 2 hours per week
 - Key managers: 10 to 20 hours total
 - Board representative: 10 to 20 hours total

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The Process



* Please note that while the Pro Bono Consultant team completes most of the work, the nonprofit also has tasks and deliverables at each stage.

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The Strategic Planning Prep Team

- Account Director
- Project Manager
- Strategy Consultant
- 2 Strategy Associates

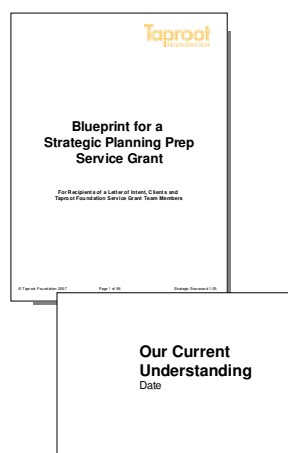
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Program Management and Tools

Your organization will be equipped with the following resources for the Strategic Planning Prep Service Grant:

- Leadership from Account Director
- Oversight from Project Manager
- Pro Bono Consultant team with Taproot tools that can be shared with you as needed:
 - Strategic Planning Prep blueprint
 - PowerPoint templates for: Our Current Understanding, Environmental Scan, Preliminary Findings, Report of Findings
 - Helpful articles and links



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Ideal Timeline*

Stage	Approximate Timing
Letter of Intent (LOI) Sent	
Account Director Assigned / Site Visit	1 month after LOI sent
Staffed	2 months after LOI sent
Kick Off Completed	2 – 3 months after LOI sent
Environmental Scan Direction Presented and Approved	4 – 5 months after LOI sent
External Discovery Complete	6 – 7 months after LOI sent
Environmental Scan and SWOT Presented and Approved	7 – 8 months after LOI sent
Project Closed	8 – 9 months after LOI sent

*Ultimately, depends on you and your team

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