



## Planning for nonprofits and philanthropy

# Planning for Your Organization's Future

Jewish Community Council of Greater Coney Island – The NonProfit HelpDesk Webinar

January 9, 2023

**I. Strategic Planning Overview:** Elements of a Plan, Steering Committee, Major Questions

**II. Case Study:** Little Chefs

**III. Research:** Interviews, Peer Scans, Roundtables

**IV. Analysis:** SWOT

**V. Developing the Plan:** Visioning, Goal Setting, Tactical Planning

slido



**Have you ever been part of a strategic planning process?**

ⓘ Start presenting to display the poll results on this slide.

### Why is it important to create a strategic plan for your nonprofit's future?

- Identifies your organization's priorities.
- Provides a framework for making organizational decisions.
- Encourages assessment of community and organizational needs.
- Offers a way to measure/assess organizational progress, success.

**Your strategy is your unique value proposition!**



# The Steering Committee



- What is the Steering Committee's role?
- Who sits on the Steering Committee and why?

Role	Name	Relationship	Committee	Interview	Roundtable	Demographics	Geographics	Reach	Expertise
Staff									
Board									
Clients									
Partners									
Funders									
Civic Leaders									
Other									
			0	0	0				

1. What are the organization's strengths to build on, and weaknesses to address?
2. What does our community want and need and how can we uniquely respond?
3. What are best practices in comparable organizations that we might adapt?

Other questions?

## Internal Data

---

Program evaluations

Financial documents

Sample grant proposals (successful and unsuccessful)

Communications materials

, and board processes.

**Organization:** Little Chefs – an afterschool program that teaches children nutrition/cooking

**History:** Founded three years ago by a local mom/chef. Became a 501(c)3 this past month.

**Financial Model:** Students pay \$100/semester (\$5/class); students who receive free/reduced lunches at school don't pay anything. Cookie sales provide earned income.

**Staffing Structure:** Program is primarily run by volunteers. One part-time employee manages curriculum/menu-planning/shopping.

**The “charge”:** A member of the board has suggested that they take a step back and make a deliberate plan for how to sustain and then grow the organization over the next few years.

# Research

**Purpose:** Gain insight and candid feedback on the functioning of your organization and trends/factors influencing the field.

**Preparation:** Create a series of open-ended questions.

**Execution:** Ensure confidentiality; take copious notes!

**Analysis:** Look for common themes across interviews.

## Sample Questions

- What is your understanding of Little Chef's mission and its role in the community it serves today?
- How would you describe the community that it serves? How is the community changing or growing? In what ways is there potential for Little Chefs to grow in response?
- What do you consider the biggest strengths and weaknesses of Little Chefs?
- What do you consider to be peer organizations to which Little Chefs should be compared? What do they provide, or what attributes do they have, that Little Chefs ought to look to as models?
- In a crowded landscape of afterschool programs, what argument do you employ to demonstrate the value of Little Chefs and its importance to the children it serves?

**Purpose:** Learn how comparable organizations have managed similar challenges and opportunities.

**Preparation:** Create open ended questions that address key opportunities / challenges of importance to the organization.

**Execution:** Involve leadership from both organizations.

**Analysis:** Look for the models they employ to address the identified opportunities / challenges.

### Sample Questions

- Please describe the program or programs of which you are most proud. What audiences do they reach and how do you know that you are succeeding in the impact you intend?
- What administrative structure do you have in place to produce or manage your programs?
- Tell us something about your operating budget. What portion comes from your fundraising activities and what portion, if any, comes from earned income?
- How does fundraising happen at your organization?
- If you were to begin again, would you structure your organization and its governance in the same way, or differently? Why and how so?

**Purpose:** Gather a breadth of perspectives into how you can better serve your clients/community.

**Preparation:** Plan to share some things you've learned from the research you've conducted to engage the group in discussion.

**Execution:** Share some of the research findings and ask the group to solve for a challenge or an opportunity.

**Analysis:** Identify solutions that are specific and practical, as well as perceptions that you'll want to address.

## Sample Exercises

- With community leaders: Here are some observations from interviews we conducted about our community's need for supplementary educational opportunities. How should Little Chefs work to address these needs? With whom should we partner for support?
- With parents: We know that children love our programs and parents are eager to enroll them; but we don't know how impactful our message about healthy foods has been. How has it influenced eating habits in your family? What can we do better?
- With restaurateurs: We need help with instruction, raw materials and cooking equipment – resources we believe that restaurants can help provide. What's the best way to approach and work with you and your peers?

# Analysis

## Interviews

- The organization has an excellent reputation in the community.
- There's strong demand for afterschool programs and a need for more quality program providers to offer classes, for a fee and for free.
- A larger local grocery chain has recently announced a desire to become more involved in the community.
- A popular local restaurant has started offering cooking classes for kids on the weekends.

## Peer Scans

- Other organizations have had to limit the number of “free” slots they offer for participants.
- Middle and high school students need volunteer hours and have helped other organizations fill some personnel gaps.
- Another founder-led organization is transitioning to a paid full-time administrator using the revenue earned from producing birthday parties.

## Roundtables

- Several chefs would be willing to commit to sending an employee to teach a class monthly.
- Parents would like classes to be offered to older children as well, and even expressed a desire to take occasional classes with their children if they were on weekends.
- Some local schools have kitchen staff who would take on extra hours of paid work to help facilitate the program at their schools.

	<b>Helpful</b> to achieving the vision	<b>Harmful</b> to achieving the vision
<b>Internal Origin</b> Attributes of the organization	<b>Strengths</b>	<b>Weaknesses</b>
<b>External Origin</b> Attributes of the environment	<b>Opportunities</b>	<b>Threats</b>

# Discussion: SWOT Analysis



	Helpful to Achieving the Vision	Harmful to Achieving the Vision
Internal Origin: Attributes of the Organization	<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>◦ Founder: reputation and leadership</li> <li>◦ Collaboration among everyone involved</li> <li>◦ Meets a need in the community</li> <li>◦ Demonstrated ability to grow</li> <li>◦ Board is invested!</li> <li>◦ Good connex to local schools</li> <li>◦ Sensitive to economics of the community</li> <li>◦ Public perception</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>◦ Volunteers can sometimes be unreliable</li> <li>◦ Revenue is not steady</li> <li>◦ School support ambivalent</li> <li>◦ Logistics of working with school kitchens</li> <li>◦ Facilities issues: storage space, etc.</li> <li>◦ Burden of compliance/background checks</li> <li>◦ Founder burnout!</li> <li>◦ Communications across network</li> </ul>
External Origin: Attributes of the Environment	<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>◦ Strong demand for programs</li> <li>◦ Parents and families want to participate!</li> <li>◦ Chefs want to help out</li> <li>◦ Funders interested in health outcomes (incl. federal, local)</li> <li>◦ Local grocery store wants to get involved</li> <li>◦ Build on reputation</li> <li>◦ Community involvement</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>◦ Regulatory environment</li> <li>◦ Competitive programs in the neighborhood</li> <li>◦ Changes in school leadership</li> <li>◦ City budget cuts</li> <li>◦ Rising cost of food</li> </ul>

	Helpful to Achieving the Vision	Harmful to Achieving the Vision
Internal Origin: Attributes of the Organization	<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>◦ Reputation in community</li> <li>◦ Committed volunteers</li> <li>◦ High demand</li> <li>◦ Engaged board</li> <li>◦ Visibility in the community</li> <li>◦ ?</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>◦ Fees don't cover program costs</li> <li>◦ No space to call our own</li> <li>◦ Unable to meet demand</li> <li>◦ ?</li> </ul>
External Origin: Attributes of the Environment	<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>◦ Afterschool providers need more programs</li> <li>◦ Restaurants willing to get more involved</li> <li>◦ Grocery store's commitment to community</li> <li>◦ Other schools are interested</li> <li>◦ Classes for adults/families</li> <li>◦ ?</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>◦ Rising cost of food</li> <li>◦ After school programs that offer childcare daily</li> <li>◦ School policies regarding volunteers</li> <li>◦ ?</li> </ul>

# Developing the Plan

A **mission** is the business of an organization; the purpose for which it exists.

Little Chefs provides children and families with the knowledge and skills to make healthy food choices a part of their daily lives.

A **vision** describes the future position of an organization; what it hopes to achieve after a specific period of time.

slido



**Which of these words/phrases best describe the impact you think Little Chefs should have on the community in the next three-to-five years? Select three.**

ⓘ Start presenting to display the poll results on this slide.

What impact should the organization have on the community in the next three-to-five years?



**Mission:** Little Chefs provides children and families with the knowledge and skills to make healthy food choices a part of their daily lives.

**Vision:** At a time of economic hardship in which food costs are rising and processed foods are more readily available, Little Chefs will help more young people, at more schools to become advocates for healthy eating for themselves and their families.

A **goal** is a broad statement of an expected outcome. It flows from the vision and responds to an organization's research findings.

An **objective** is a specific strategy, initiative, program, or service designed to operationalize a goal.

**Goal 1. Formalize Partnerships:** Partner with local businesses to ensure a reliable, affordable and high-quality source of food and educators.

## Objectives:

1. Assess which program needs (e.g., food donations and chef educators) could be easily and affordably met by local grocery stores or restaurants, and formalize partnerships through signed agreements.
2. Review and revise the curriculum to make best use of the assets offered by local stores and restaurants.

(What other Goals and Objectives can you imagine to fulfill the Mission, realize the Vision, and respond to the research?)

## Rationale

- Why is the objective important?

## Outcomes

- Impacts you aim to achieve

## Key performance indicators

- How will you measure success, and against what baseline?

## Tactics

- Specific action steps over the life of the objective

## Financial implications

- What will it cost, and where will the money come from? What might it earn or save?

# Contact Us



Questions?

**Adam Gaynor, PhD**

[adamgaynor@planaadvisors.com](mailto:adamgaynor@planaadvisors.com)

917-923-4834

**Evan Kingsley**

[evankingsley@planaadvisors.com](mailto:evankingsley@planaadvisors.com)

917-929-8556

[www.PlanAAdvisors.com](http://www.PlanAAdvisors.com)