

STRATEGIC PLANNING



*How to make sure your best laid plans make it
off the white board.*

www.nonprofitnav.com

A BIT ABOUT



NONPROFIT NAV

NONPROFIT **STRATEGY** SPECIALISTS

Nonprofit Nav provides nonprofit consulting and planning services for established nonprofit organizations. We specialize in the “big lift” stage experienced when scaling to the next level of growth.

Our leadership and consultants are experienced professionals with track records of success in the areas of growth most nonprofits need, including:

- Strategic Planning
- Campaign Planning & Design
- Marketing and Branding
- Finance and Budgeting

If you want to move your organization forward with **clarity** and **confidence**, we’re the right partner to work with.



The experience of working with Katie Appold through the strategic planning process was exceptional. Katie is endlessly kind, supportive, positive, and knowledgeable. My entire team and Board were impressed with her and Nonprofit Nav, and if we have the occasion to do so, we will hire them again!

Michelle Quist-Ryder, CEO
Amercian Psychological Foundation



GOOD STRATEGIC PLANNING IS...

Moderated Independently

Strategic planning is a time to listen to the crowd, not the loud.

While it may sound harsh to say we all have agendas, it is certainly understandable that we all have ideas for moving things forward. The problem is that we also carry biases, experiences, and perspectives that can be valuable but limiting. An outside moderator removes any inherent bias in the conduct of the meeting and ensures all voices are heard while adding an outside perspective.

Documented and Designed for Accountability

Who took photos of the whiteboard? How did we manage to lose giant Post-it pages!?!

A strategic plan should serve as an action-oriented guide or map to your organization's growth. A well-documented plan is clear and concise. It should be simple, easily accessed, and designed for accountability.

GOOD STRATEGIC PLANNING IS...

Limited in Scope

Five years ago, there was a pandemic and global shutdown that no one had in their strategic plan.

The world moves and changes faster than ever before. Gone are the days of 5-10 year vision boards and plans. Make a plan that the people in the room can all become invested in because they'll be around to see it happen. A one to two-year plan allows for growth as well as flexibility.

Ambitious but also Realistic (S.M.A.R.T. Goals)

Please don't plan to win a grant from Mackenzie Scott. Please.

You can't plan to win grants or budget for growth without actionable steps to get there. Strategic planning goals should be:

- Simple
- Measurable
- Achievable
- Relevant
- Time-Bound



Nonprofit Nav came to our nonprofit organization, READ Ottawa to lead and facilitate a strategic planning session for our Board of Directors. They did an excellent job leading this experience with a clear thorough agenda to create three-year goals for our organization. Everyone was extremely pleased with our experience and we would recommend Nonprofit Nav to other nonprofits who are in need of guidance.

- READ Ottawa



WAY MORE THAN SWOT

A RESULTS-DRIVEN PLAN

The Nonprofit Nav Process

Often strategic plans examine a moment in time for your organization and the far-off dreams of what could be. It's everything in the middle that is missing! Using the Entrepreneurial Operating System (EOS) principles and our experience in the nonprofit space, we've designed a strategic planning process that provides a **simple, clear, and highly focused** plan.

A Look at What Needs to Start and Stop

A good strategic plan is not a to-do list or a pie-in-the-sky list of goals without a strategy to reach them. Our analysis starts by looking at what is working and what is not.

"It is easy to add ... it's hard to stay focused. And so the hardest decisions we make are the things not to work on."

Tim Cook, Apple CEO

What Makes Your Organization Different?

You can try everything everyone else does, but copying is not a strategy. Building from your organization's core competencies, passions, and strengths is wiser. We analyze your organization's differentiating factors and create goals that maximize those areas.

Breaking it Down

A realistic timeline that is short enough to build traction and see results combined with an actionable work plan and strategy to make it happen.

GET STARTED



OUR CONTACT



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