

Strategic Planning as Fuel for Grants Development

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Too often in this field we find ourselves writing grant proposals in a vacuum just to satisfy immediate needs. How often have you heard a fellow staff member or board member identify a need and follow up with "we'll get a grant for it!" This approach to fund development ignores the importance of linking grant requests to the larger organizational mission. Not only is it difficult for the grantwriter to persuasively convey the need and rationale for such disparate projects, but even more difficult for the foundation trustees to understand how their gift will be an investment, not just a short-term bailout. What can we do to avoid this? **Develop a strategic plan.**

Now, I don't mean one must hire an expensive consultant, take your board to a pricey conference retreat and inundate them with glitzy graphic PowerPoint presentations and handouts. All you need is this article and committed board members who are willing to **devote a Saturday to "dream" about your organization's future**, and put in place action items that will make your dream come true. I recently had the opportunity to conduct a (admittedly low-budget) strategic planning session for a board that I sit on, and it was an enriching and productive session for all involved, one that I think helped to define some key issues that will ultimately translate into well-developed proposal ideas. I would like to share with you our experience, and offer up some suggestions on how to conduct a similar session with your organization.

Why do strategic planning?

Our decision to conduct a strategic planning process began at a board meeting discussion of potential future funding shortfalls, which lent itself to a call for more aggressive fundraising in the community with newly identified funders and face-to-face calls. One board member remarked frankly that she wasn't confident that the organization would survive without the involvement of the founder (and current Executive Director). The potential for merger or collaboration with another like organization also came up as a potential solution for our money problems. Recognizing that these were very strategic issues that we had no answer to, the board decided that a plan for the future was needed, which would not only help direct the organization, but demonstrate to funders that their investment will help contribute to the achievement of our overall plan of success, and that the board had adequately identified and addressed any potential hindrances to that success.

How?

- Obviously, the most important step is to **get buy-in from all board members**. They need to believe in the value of the process.
- Identify either a board member or someone outside the organization to serve as moderator and keep the discussion on topic and within the scheduled time limitations as suggested below.
- Try to schedule the meeting well in advance, on a day when a **solid six hours is available**, and people have the opportunity to schedule other activities around this important meeting.
- The individual moderating the meeting should **provide board members with some prompting questions at least two weeks before the meeting**, in order to maximize the time spent on discussion.
- Clearly indicate to board members that preparation and contribution to the meeting is expected, and will likely result in an earlier finish time.
- Assign someone (perhaps the board secretary) the responsibility of recording important points that come out of the agenda discussion.

Set the agenda for the meeting as follows:

I. Visualize/Dream what the organization will look like in 5 years (in terms of services, staffing, clients, facilities, technology, etc.) - 9-10:30

II. Break for 15 minutes

III. Consider **Strengths, Weaknesses, Opportunities and Challenges (SWOT)** (internal and external to the organization) that help or hinder reaching the 5 year vision.
10:45 - Noon

IV. Break for lunch or have a working lunch

V. Action Steps - What can we do in the next year, or 2 years, that will address the **SWOT** so that we can move towards are 5 year goal?
Noon -- 3 p.m. if adopting the working lunch model.

What Strategic Planning Did for Us

When the board envisioned what the organization would look like in 5 years, we decided that program activities should relate not just to women but to families, and include an expanded curriculum in nutrition and health education and wellness. We also saw great advantage to growing the children's program from essentially a day care center into one that offers parenting programs, and identification and referral of special educational needs. The process also helped us identify a potentially serious threat to our facilities: a rather unclear informal arrangement of occupancy in the current building with a religious organization that had recently undergone a change in leadership. This encouraged discussion of the need for a new type of facility and what the nature of that would be. The board specified that the new facility remain in a home-like structure in a different location that makes it easier for clients to attend the program. A new facility must also be ADA-compliant, which the present facility is not.

From this discussion, one can clearly see staffing and capital needs that can form the basis of a grant request. Our discussion also brought forth a rationale for **why** these program components are important -- because they help us build capacity to reach our long-term goals of program expansion. Again, through group discussion, we realized that we were a unique model of service that could lead the social service community and actually inform the foundation community of issues demanding attention, not through grant requests but engagement in a discussion. Finally, we fleshed out a succession plan in the event of a planned or unplanned departure of the founder, and what types of skills, knowledge, and qualifications her replacement must exhibit. All of these were translated into specific action steps to do in the next year.

Although it is still in production, the "deliverable" is a simple document which restates the new vision statement to include a family focus, with long-term vision and specific actions steps recorded for each area of operations (Staffing, Facilities, Technology, Development, Public Relations). Finally, in order to make this a dynamic plan, it is critical that the board review it annually and revise depending on current circumstances. Completing action steps or revising strategy is one more way to demonstrate to a funder that they will be investing in an organization with foresight and initiative to stay on course with their mission and goals.