

Your Plan, Your Funding:

A Strategic Planning Model For Sustainable Community Impact
Rhode Island Land and Water Conservation Summit, 2024



Does this strategic plan look familiar?

Task	Person	Date
Map priorities	Alex	January
Conserve key places	Marty	June
Pass Bill	Chris	July
Raise Funds	Pat	August
Recruit Board Members	Jesse	September
Update Software Systems	Casey	November

What you will learn today:

- Three Principles for a good strategic plan, and
- How to pick planning tools that organize you and your board and inspire donors and your community.



Agenda:

- Presentation
- Exercise
- Discussion

Three Principles for a good strategic plan:

- Strive for Adaptive Management,
- Be clear about the problem you are trying to solve, and
- Set measurable, outcome-oriented goals (i.e. avoid “to-do lists”).

Principle One: Strive for Adaptive Management

Definition, in Stankey et. al.: The integration of project/program design, management, and monitoring to systematically *test assumptions in order to adapt and learn*. The three components of adaptive management in environmental practice are:

1. Test assumptions by *trying* different actions *to achieve a desired outcome*.
2. *Learn* by explicitly documenting a team's planning and implementation processes and its successes and failures for internal learning.
3. *Adapt* by changing assumptions and interventions to respond to new or different information obtained through monitoring and project experience.



Principle Two: Be clear about the problem you are trying to solve.

Understand the system you are working in, including:

- Natural systems, and
- Social systems.

Identify measurable ways the systems are not in “good” condition, or are trending downward.

“Benchmarking” to other systems is a good way to learn.

Models help.



Principle Three: Set measurable, outcome-oriented goals.

Tie your goals to the problems you are trying to solve.

Make your goals SMART:

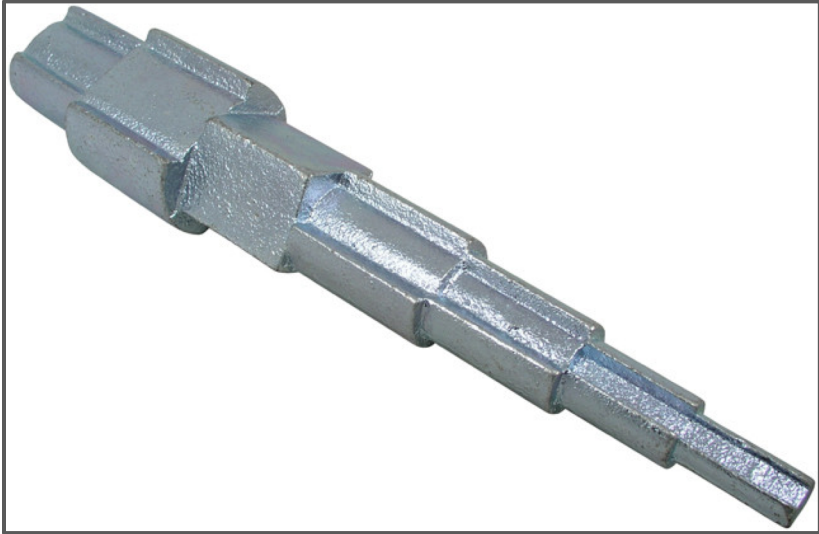
- Specific,
- Measurable,
- Actionable,
- Reasonable, and
- Time-bound.

Extra points for goals that address community issues such as:

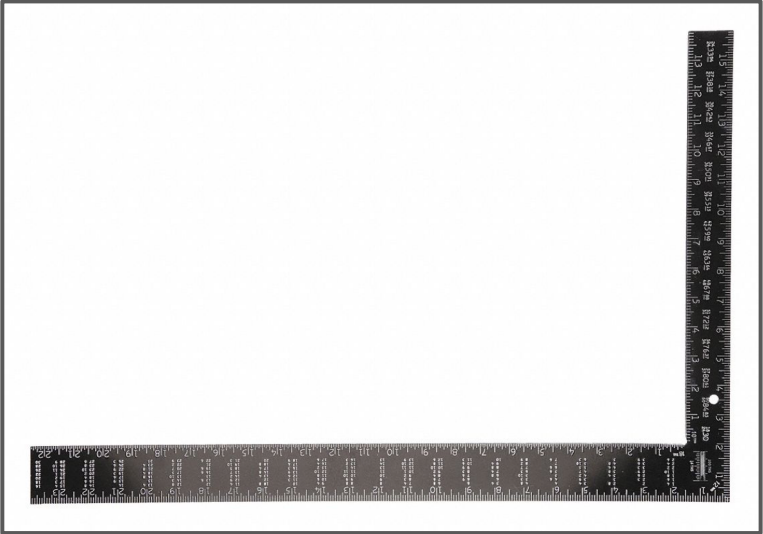
- Health,
- Education, and
- Local economy.



Strategic planning tool-box



Or?



SWOT

Pros:

- Quick and easy.
- Data not necessary.
- Can be done without a facilitator.
- Good way to get started.
- Good way to tackle straightforward problems.

Cons:

- May not be a rigorous analysis.
- May not offer you clear insights.
- May not lead to long-term change or donor engagement.

Open Standards for Conservation

Pros:

- Promotes adaptive management.
- Demonstrates rigorous thinking.
- Founded in data and lived experience.
- Good for tackling complex problems.
- Excellent framework for program/project planning.

Cons:

- Requires facilitator and/or software tools.
- May not lead to donor engagement.
- Takes time.

Nonprofit Lifecycles

Pros:

- May identify critical, and overlooked areas for your organization's growth.
- Organizational developments may improve your professionalism and impress donors.
- Capacity-oriented.

Cons:

- Not community or outcome-oriented.
- Will not help you understand the problem you are trying to solve (i.e. community impact).

Change Management

Pros:

- One of the few frameworks for internal change, including culture change.
- Based on review of hundreds of change initiatives.
- Recognizes the human nature of the challenge.
- Straightforward process.

Cons:

- Needs a small team to implement and push forward.
- Engages donors only to the extent that donor engagement is part of the strategy you are trying to enact.
- Not useful for small orgs?

Impact Cycles: Using the flywheel model to affect change and grow your organization.

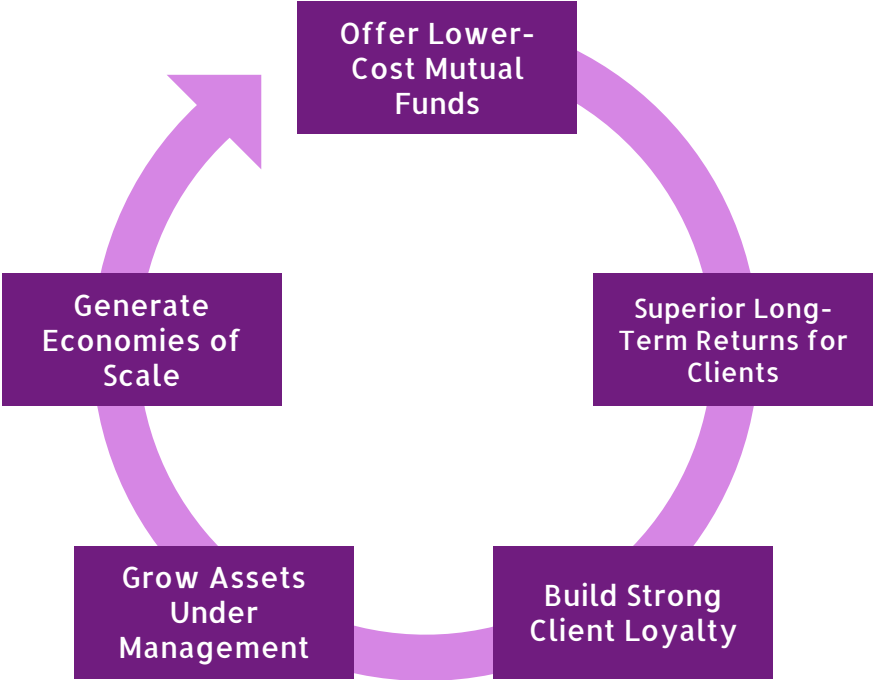
From Jim Collins' *Good-To-Great* Series.

Using the Flywheel Effect for your work:

- Be clear about the outcomes you are trying to achieve in your community.
- Describe how making progress on those outcomes will benefit your organization.
- Describe how those benefits drive additional changes.
- Describe how those additional changes help you achieve more of your desired outcomes.



Impact Cycle Example: Vanguard Mutual Funds



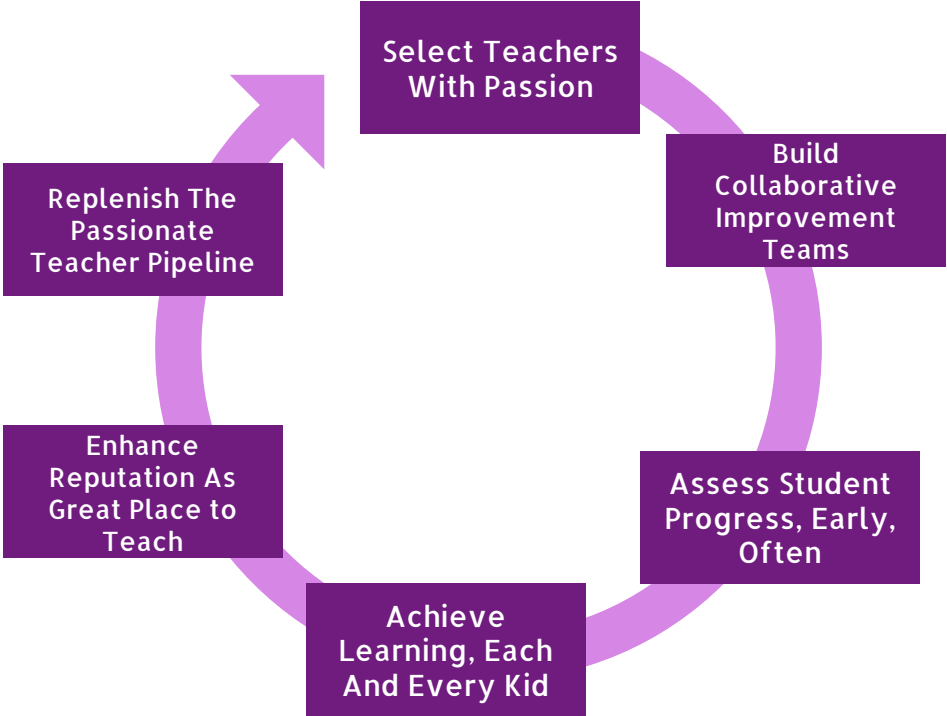
Impact Cycles: Using the flywheel model to affect change and grow your organization.

Excerpted from Collins' *Turning the Flywheel: A Monograph to Accompany Good to Great*.

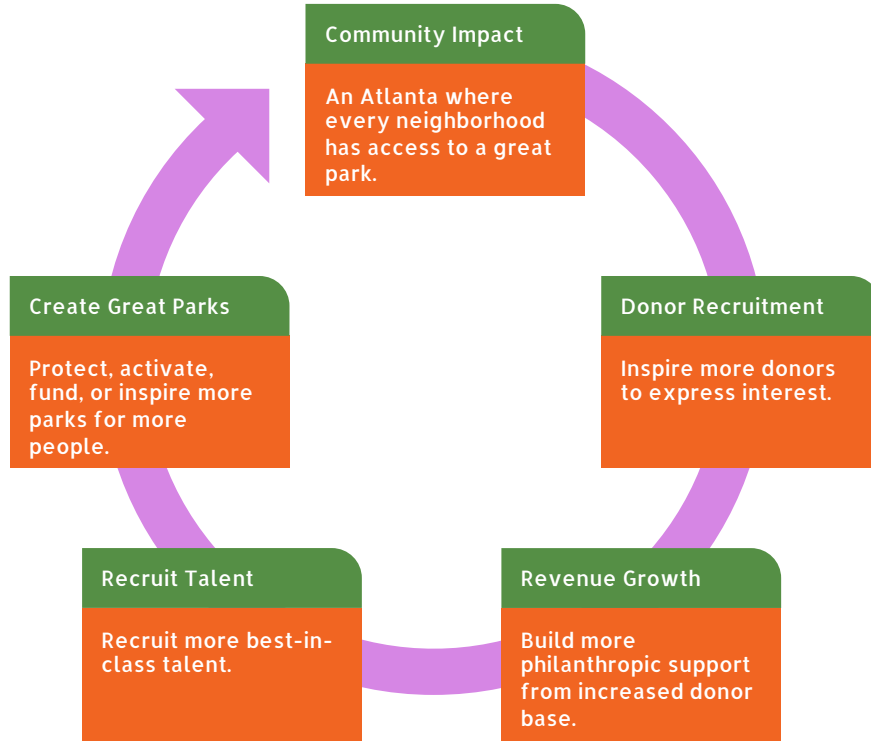
- Using the components you've identified, sketch the impact cycle, starting with your 1-3 community impact goal(s). And what follows next? And next after that?
- Explain why each component follows from the prior component.
- Outline the path back to your community impact.
- How does the loop cycle back upon itself to accelerate momentum?
- More than six components? Pare it down!



Impact Cycle Example: Ware Elementary School, KS



Impact Cycle Example: Hypothetical park NGO





Exercise

Land Trust Goal:

Goal: To stop forest fragmentation by creating forest preserves that become outdoor classrooms for 5-8th graders (most at-risk ages, academically especially for girls)

Watershed Group Goal:

Goal: Remove impervious surfaces so that river flooding is reduced in low-income neighborhoods.

Discussion

What did you like?

What would you change?

What you learned today:

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- How to pick planning tools that organize you and your board and inspire donors and your community.

