

Index

Action plans	
adjusting.....	104
assigning responsibilities in.....	100
conducting reality check of.....	103
developing (worksheet)	257
ensuring completion of	102
ensuring integration of.....	102
example of	98
guidelines to develop	99
identifying objectives in	99, 118
identifying performance targets in.....	102
identifying resources in.....	101
identifying timelines in	100
identifying who will monitor and how ..	102
rolling up.....	102
sources of content in	98
typical content of	97
Advertising and promotions plans	107
Assessments (during internal analysis)	60
Board of Directors	
approval of budget	108
approval of mission statement	76
approval of strategic plan.....	112
authorization of the strategic plan..	113, 120
CEO reports to	123
combined with staff in planning	18
definition of	159
delegation from.....	119
diversity of structures	205
ensure mission statement is referenced....	72
example work plan for	121
getting their buy-in to planning	47
how planning builds.....	6
if cynical about planning	18
if not ready for planning	149
in organization chart	202
must be involved in planning.....	39
on planning committee	20
responsibility to monitor plan	102
should be involved in external analysis ...	39
should drive planning	20
training them about planning	48
typical calendar of activities for	13
Brainstorming	
<i>See</i> Techniques in facilitation	
Chasing the money	76
Chief Executive Officer	
buy-in (getting) to planning.....	47
definition of	159
delegation and role of.....	119
in organization chart.....	203
involvement in planning	39
must participate in planning	41
on planning committee	20
reports to the Board	123
training about planning.....	48
typically not facilitate planning.....	40
Client analysis.....	54
Clients	
definition of.....	vii
Collaborator analysis	56
Competitor analysis	56
Consensus	
<i>See</i> Techniques in facilitation	
Consultants	
contracting with.....	196
getting and hiring	194
helping them understand you	195
making them productive.....	194
when they're useful	193
where to get	193
working with	193
Data collection	
assessing client needs	191
conducting focus groups.....	189
conducting interviews	185
trends about nonprofits.....	168
Discussion.....	
<i>See</i> Techniques in facilitation	
Diversity	
affects in planning	131
how to facilitate with.....	131
learning to work with	131
Environmental scan	56
Executive summary	
<i>See</i> Strategic plan document	

External analysis	
client analysis	54
client analysis (worksheet)	237
collaborator analysis	56
collaborator analysis (worksheet)	245
competitor analysis	56
competitor analysis (worksheet)	246
definition of	53
don't skip it	52
environmental scan	56
environmental scan (worksheet)	241
examples of opportunities and threats	58
identifying opportunities and threats	58
opportunities analysis during	57
opportunities and threats (worksheet)	248
order of activities in	54
stakeholder analysis	55
stakeholder analysis (worksheet)	239
threats analysis during	58
Facilitating	
challenges in	149
clarifying your expectations in	134
dealing with group resistance	155
develop contract for	134
developing contract for	132
enhancing group participation	150
getting and working with	193
getting groups unstuck	153
getting started	127
group decision making	152
in highly diverse environments	131
learning to work with diversity	131
managing group conflict	152
techniques	
<i>See Techniques in facilitation</i>	
understand nonprofits before	127
Facilitator	
definition of	vii
knowing your biases as a	130
knowing your style as a	130
suggested goals for a	128
suggested principles for a	129
understanding yourself as a	128
what a facilitator does	127
working assumptions for a	128
Financial plans	108
Fundraising plans	106
Goals and strategies	
criteria for effective	85
dimensions of	84
ensuring strategic	83
examples of	87
guidelines to identify	89
identifying (worksheet)	255, 256
identifying goals	89
identifying strategies	92
SMART goals	88
tools to identify	87, 259
Goals-based planning	
description of process	25
when to use	26
Ground rules	
<i>See Techniques in facilitation</i>	
Implementation of plans	
delegation during	119
leadership during	118
monitoring the	118
specific approaches to ensure	120
specific tools to track	122
supervision in	118
Implementation plans	
<i>See Action plans</i>	
Internal analysis	
definition of	60
examples of strengths and weaknesses	64
identifying strengths and weaknesses	64
priorities often forgotten during	63
strengths analysis during	63
strengths and weaknesses (worksheet)	249
using assessments during	60
using program evaluations during	62
weaknesses analysis during	64
Intervention by facilitator	
<i>See Techniques in facilitation</i>	
Issues-based planning	
description of process	26
when to use	28
why often best suits many nonprofits	27
Leadership	
definition of	9
implementation of plan requires	9
Meeting agendas	
<i>See Techniques in facilitation</i>	
Meeting management	
<i>See Techniques in facilitation</i>	

Mission statements	
are various approaches to developing	72
chasing the money	76
definition of	73
developing (worksheet)	251
do mission now?	50
preparation for reviewing	74
preparation for writing	74
reviewing and approving	76
writing new	75
Nominal group technique	
<i>See</i> Techniques in facilitation	
Nonprofits	
all flows from strategic planning in	5
assessing	60, 171
culture of typical	199
definition of	161
develop facilitator contract with	134
developing facilitator contract with	132
developing organizational profile of	45
guidelines to change in	269
learn nature of planners in	133
nature of	199
organization charts of	202
organizations assisting	167
sources of trends about	168
strategic planning clarifies direction of	3
typical calendar of activities in	13
typical cycle of operations in	206
typical problems in	265
typical solutions to problems in	265
understanding planners in	132
Objectives	
<i>See</i> Action plans	
Operating budgets	
balancing	110
developing	108
identifying expenses	108
identifying revenue	109
obtaining review and approval of	110
sample format of	111
selecting time frame of	108
Operational plan	161
Opportunities for the organization	<i>See</i>
External analysis	
Organic planning	
description of	28
when to use	29
Parking lot	
<i>See</i> Techniques in facilitation	
Performance plans	104
example of	104
Performance targets	102
Planners	
clarifying expectations of	134
clarifying roles of	135
definition of	vii
developing facilitator contract with	132
learning nature of	133
understanding their nonprofit	132
Planning committee	
membership on	20
organizing (worksheet)	214
responsibilities of	20
Problems	
<i>Also see</i> Strategic issues	
detecting in nonprofits	60
facilitating group solving of	152
guidelines to solving	260
one of biggest in strategic planning	11
organic approach to solving	263
typical problems in nonprofits	265
typical solutions in nonprofits	265
typical symptoms in nonprofits	265
Program evaluation plans	107
Program evaluations	62
Program planning	
criteria in	179
reasons for	23
special considerations in	24
Programs	
configurations and types	208
consider program evaluations	62
definition of	162
evaluation plan for	107
focusing planning on	23
in organization chart	204
outcomes from	84
performance planning for	104
plans for	105
review of	123
Round robin	
<i>See</i> Techniques in facilitation	
Scenario planning	
description of process	30
when to use	30
Schedule for strategic planning	12, 36
length of process	36
sample sequence and schedule	37
scheduling and duration of meetings	36

Situational analysis	50	Strategic planning	
Staff		action planning	
combined with Board in planning	18	<i>See</i> Action plans	
definition of	162	advertising and promotions plans.....	107
delegation of	119	analogy to understand	4
evaluation of	174, 176	any concerns about.....	19
getting their buy-in to planning	47	assessing if you're ready for (worksheet)	
how planning builds	6	212
if cynical about planning	18	bottom-up	33
in organization chart	202	buy-in (getting) to process	47
involvement in planning	39	can start anywhere in.....	9
meetings.....	122	common traits of any.....	9
on planning committee	20	costs of	14
staffing plans	104	definition of.....	3
strong role in action plans.....	99	developing organizational profile	45
training them about planning.....	48	developing schedule (worksheet)	227
Staffing plans	104	diagram of process	7
example of	105	do mission now?.....	50
Stakeholder analysis.....	55	establishing strategic direction.....	72
Stories		evaluating the	136, 178
<i>See</i> Techniques in facilitation		external analysis.....	
Strategic		<i>See</i> External analysis	
criteria to be.....	68	factors that influence	8
definition of	5	financial plans	96
Strategic issues.....		flexible planning	11
<i>Also see</i> Problems		framework of.....	7
definition of	67	fundraising plans	106
do strategies soon after	71	getting buy-in (worksheet).....	235
examples of.....	68	goals	
identify them now?	66	<i>See</i> Goals and strategies	
selecting	69	goals-based planning	25
Strategic management		identifying best approach (worksheet) ..	218
definition of	14	identifying reasons to do now	21
Strategic plan document		identifying reasons to do now (worksheet)	
adjusting as needed.....	124	215
arranging internal review of	115	identifying scope of plan.....	22
celebrating completion of.....	116	identifying terms (worksheet)	231
coordinating approval of.....	116	identifying time span.....	35
distributing and communicating	116	identifying time span (worksheet).....	226
drafting	112	identifying who involved (worksheet) ..	228
executive summary in.....	114	implementation plans	
external stakeholders' review of.....	115	<i>See</i> Action plans	
typical contents of.....	112	incremental or fresh start?.....	34
who should write	114	internal analysis.....	
		<i>See</i> Internal analysis	

<p>issues-based planning26</p> <p>its influences in nonprofits.....5</p> <p>jump starting xii</p> <p>length of process36</p> <p>major benefits of6</p> <p>minimum requirements for17</p> <p>mission statements50</p> <p style="padding-left: 20px;"><i>See</i> Mission statements</p> <p>monitoring implementation <i>See</i></p> <p style="padding-left: 20px;">Implementation of plans</p> <p>myths about.....10</p> <p>need outside help?.....41</p> <p>need plan document?33</p> <p>objectives <i>See</i> Action plans</p> <p>operating budget <i>See</i> Operating budgets</p> <p>operational (definition of).....5</p> <p>operational plan161</p> <p>opportunities facing organization <i>See</i> External analysis</p> <p>organic (holistic) strategic planning28</p> <p>organizing planning committee (worksheet) 214</p> <p>performance plans.....104</p> <p>plan for a plan17</p> <p>planning committee20</p> <p>planning fatigue96</p> <p>program evaluation plans.....107</p> <p>program plans105</p> <p>provide planning guide to planners.....45</p> <p>realistic planning.....11</p> <p>reasons for organization-wide.....23</p> <p>reasons for program-wide23</p> <p>relevant planning11</p> <p>scenario planning30</p> <p>scheduling <i>See</i> Schedule for strategic planning</p> <p>scope of plan (worksheet).....216</p> <p>selecting the best approach to25</p> <p>staffing plans.....104</p> <p>strategic (definition of)5</p> <p>strategic issues66</p> <p>strategic issues (worksheet)250</p> <p>strategic plan document <i>See</i> Strategic plan document</p> <p>strategic thinking <i>See</i> Strategic thinking</p>	<p>strategies..... <i>See</i> Goals and strategies</p> <p>strengths of organization <i>See</i> Internal analysis</p> <p>summary of approaches to.....31</p> <p>terms used in.....43</p> <p>threats facing organization <i>See</i> External analysis</p> <p>three criteria for effective10</p> <p>timing of situation analysis50</p> <p>to learn more about.....14</p> <p>top down33</p> <p>top-down and bottom-up34</p> <p>training planners48</p> <p>training planners (worksheet).....236</p> <p>values statements..... <i>See</i> Values statements</p> <p>variations in8</p> <p>verifying you're ready for17</p> <p>vision statements <i>See</i> Vision statements</p> <p>weaknesses of organization <i>See</i> Internal analysis</p> <p>what it won't do.....9</p> <p>what materials are needed?.....43</p> <p>who will be involved?39</p> <p>Strategic thinking.....83</p> <p style="padding-left: 20px;">definition of.....6</p> <p style="padding-left: 20px;">ensuring strong83</p> <p style="padding-left: 20px;">essence of52</p> <p>Strengths of the organization <i>See</i> Internal analysis</p> <p>SWOT</p> <p style="padding-left: 20px;">definition of.....69</p> <p style="padding-left: 20px;">framework for analysis of264</p> <p>Techniques in facilitation</p> <p style="padding-left: 20px;">brainstorming139</p> <p style="padding-left: 20px;">consensus.....139</p> <p style="padding-left: 20px;">discussion141</p> <p style="padding-left: 20px;">ground rules.....142</p> <p style="padding-left: 20px;">intervention.....141</p> <p style="padding-left: 20px;">meeting agendas142</p> <p style="padding-left: 20px;">meeting management.....143</p> <p style="padding-left: 20px;">nominal group technique145</p> <p style="padding-left: 20px;">parking lot145</p> <p style="padding-left: 20px;">round robin146</p> <p style="padding-left: 20px;">stories146</p> <p style="padding-left: 20px;">voting.....147</p>
---	--

Terms in planning	43	Vision statements	
Threats facing the organization.....		are various approaches to developing	72
<i>See</i> External analysis		definition of.....	77
Time span of strategic planning	35	developing (worksheet).....	253
Training about strategic planning	48	preparing for writing and reviewing	77
Values statements		reviewing and approving.....	79
are various approaches to developing.....	72	writing new	78
definition of	79	Voting.....	
developing (worksheet)	254	<i>See</i> Techniques in facilitation	
example of	82	Weaknesses of the organization	
preparing for writing and reviewing.....	80	<i>See</i> Internal analysis	
reviewing and approving	82		
writing new.....	80		