



Management Consulting to Independent
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NON-PROFIT STRATEGIC PLANNING

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In recent years, strategic planning has become a more "democratic" process leading to large committees with many staff members, clients served and/or other constituents involved in discussions and decision making. Not all clients should adopt this more "democratic" and "broad brush" approach, however. In some instances, it can lead to a diffusion of mission and direction, and create a loss of momentum for the school. It may be especially risky for a newly appointed CEO or an organization with a recent volatile political situation or an unsettled staff or "customer" base.

Some organizations choose a more directed planning process that includes substantial input from a number of focus groups of relevant stakeholders. This approach keeps final decision making more closely within the management and the board.

It is also possible to blend the two approaches: by including the focus group meetings of the second process with selected involvement of some key constituent decision makers involved in the first "broad brush" process.

In all cases, the culture of the organization, and the tenor and climate of the staff and constituents should temper and guide the board's decision about which process to use.

Littleford & Associates has successfully guided over 100 clients through these strategic planning approaches by emphasizing that the real strategic issues go beyond the classic (but still important) goals of funding new buildings, improving technology and increasing endowment. The nine key elements of strategic planning include:

1. Establishing mission clarity through a few key words that resonate with all crucial constituencies. They form the core statement defining the organization's unique character and the starting point for all planning.
2. Ensuring a strong foundation of healthy governance through the careful work of the committee on trustees that guarantees institutional memory on the board and the longevity of service of effective leaders.
3. Developing a strategic long range financial plan that will guide how money is raised and spent to enhance and preserve the mission.
4. Acquiring appropriate understandings of potential future political, economic and legal



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challenges and designing contingency plans to meet them.

5. Providing for healthy staff cultures which includes designing a salary philosophy, salary system and evaluation plan that meets the strategic needs and mission and guarantees the ability to attract, retain and reward those who most reflect that mission.
6. Developing a communications and marketing plan that attracts and retains the market served and builds trust and support.
7. Ensuring that management is discussing innovative programs and centers of excellence that reflect mission and history yet convey relevance to the future..
8. Planning for risk management ranging from ensuring physical security; dealing with contagious disease; handling a scandal; reviewing policies regarding sexual harassment; and addressing attitudes towards alternative lifestyles.
9. Avoiding financial and other conflicts of interest, especially on the Board but even within the staff.

Littleford & Associates helps to lay the important groundwork for strategic planning by addressing these strategic issues. Ignoring them may undermine fundraising for important long range needs.