

Turning Ideas into Impact: Strategic Planning for Nonprofit Leaders

Important Insights Webinar for Community Organizations

Friday, February 20, 2026, 10am – 11am US Central Time via WebEx

In an era of limited resources and rising expectations, nonprofit organizations need a strong strategy that can help them say “yes” to the right things—and “not now” to the rest. An effective strategic plan should help build alignment across staff and board members, prioritize initiatives, and manage risk with confidence.



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Join our guest speakers as they discuss the why, what, and how of strategic planning for nonprofit organizations.

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STRATEGIC PLANNING OVERVIEW



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STRATEGIC PLAN

What it IS:

- ✓ A roadmap that aligns the organization's people, processes and priorities toward a shared vision of success over a defined period.
- ✓ A decision-making guide to say 'yes' to the right opportunities and 'not now' to distractions.
- ✓ A multi-year plan designed to create accountability for long-term goals and organizational sustainability.

What it is NOT:

- × A collection of every idea or wish list
- × A static document
- × A fundraising plan

How is it different from Annual Plans?

	Strategic Plan	Annual Plan
Asks:	Where are we going	What will we do this year
Addresses:	Long-term trends and threats	Near-term opportunities and needs
Prioritizes:	Change and Growth	Delivery and Execution
Measures:	Organizational Impact	Organizational Output

STRATEGIC PLANNING IN ACTION

Case Studies: Why and How We Did It



Leroy Abrahams

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	Jubilee Park & Community Center	Branches Inc.
Mission	To be a catalyst for comprehensive community revitalization and enrichment in Southeast Dallas.	Partner with families to build educational and financial assets, community and hope.
Years in service	29 years (1997)	53 years (Launched 1973; Incorporated 1981)
Location	Dallas, TX	Miami, FL
Staff size	24 Full Time, 21 Part Time	40 Full Time, 23 Part Time
Annual Budget	\$5.8 Million	\$6.2 Million
Board size	24 members	35 members
Strategic Plan Period	3 Years (January 2025 – December 2027)	4 Years (July 2025 – June 2029)
How long did it take to develop the plan?	6 months (April 2024 – December 2024)	6 months (Sept 2024 – March 2025) Hired a paid external consultant
Which stakeholders participated in the planning?	All full time staff, all board members and funders	Interviewed 100 stakeholders including program beneficiaries, funders, board members, and all staff members

STRATEGIC PLANNING TEMPLATES & RESOURCES

How you can get started



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3 Year Strategic Plan: A Brief Guide

Objective & Outcomes

- ✓ **Produce a 3-Year Strategic Plan with clear strategic priorities and success metrics**
- ✓ **Build organizational alignment around mission, values, and best path forward**
- ✓ **Provide actionable initiatives supporting strategic priorities**

Full Process Overview: 5 Phases

1. Preparation & Planning
2. Foundation & Alignment
3. Strategic Priorities
4. Key Initiatives & Metrics
5. Draft, Validate, & Finalize 3-Year Strategic Plan

Detailed Phases

Preparation & Planning

- *Form Strategic Planning Committee – include necessary board members, strategy partners, and key stakeholders*
- *Produce Template – for data gathering and clarifying*
- *Create Session Schedule – regular working sessions with key tasks*

Foundation & Alignment

- *Confirm mission and values of organization*
- *Review key internal data – funding sources, services, etc.*
- *Conduct internal and external analyses – operating environment & SWOT*

Strategic Priorities

- *Discuss broad strategic issues and opportunities over the next 3 years*
- *Identify, workshop, and define 3-4 strategic priorities that align with mission and capacity*

Key Initiatives & Metrics

- *Assign 3-4 actionable and measurable initiatives per strategic priority*
- *Define success for each initiative*
- *Outline a plan for each strategic priority – resource needs, monitoring cadence, communication streams, etc.*

Draft, Validate, & Finalize 3-Year Strategic Plan

- *Compile all inputs from preparation and working sessions into a cohesive document*
- *Ensure alignment between priorities, goals, and organizational capacity*
- *Share draft with strategic planning committee for feedback and validation*
- *Produce final version of the strategic plan for board approval*

Foundational Elements

Guiding Principles

Mission Statement and/or Vision Statement

Statement(s)

Values



Value Description



Value Description



Value Description



Value Description



Value Description

Community Impact

Overview of Services Provided



Service/Action
Description



Service/Action
Description



Service/Action
Description



Service/Action
Description

Operating Environment

Near- and Long-Term Trends and Expectations

Economic

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- Bullet
- Bullet

Community Need

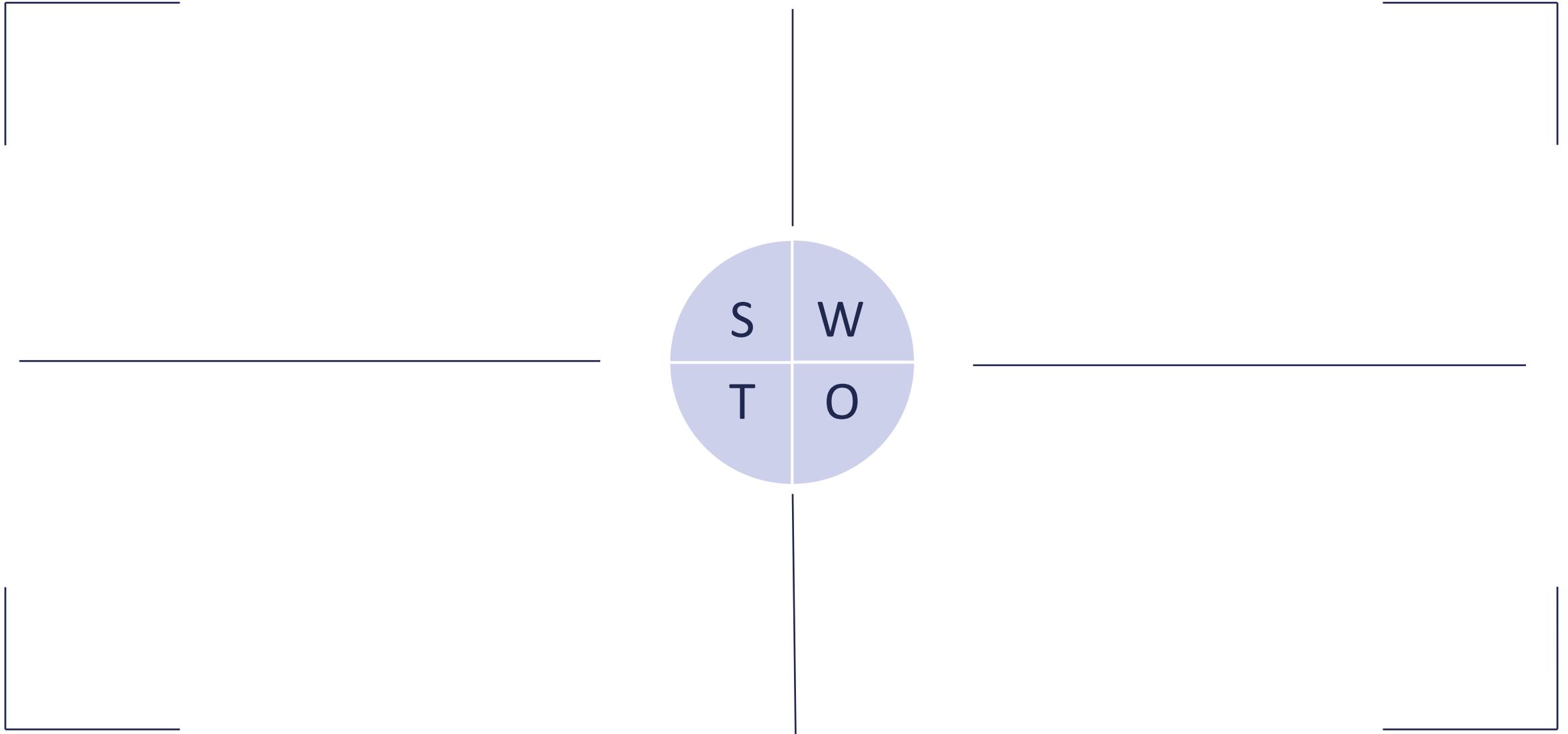
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Funding

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SWOT Analysis

Strategic Self-Assessment



Funding Streams

Sources, Risks, and Opportunities

Government Grants

- Current status
- Risk
- Opportunity

Fundraising

- Current status
- Risk
- Opportunity

Investment Income

- Current status
- Risk
- Opportunity

Strategic Priorities

Shaping the Direction of Credit Coalition

Strategic Priority #1

Description of strategic priority

Strategic Priority #2

Description of strategic priority

Strategic Priority #3

Description of strategic priority

Strategic Priority #4

Description of strategic priority

Strategic Priority #1

Deep Dive



Initiative #1

Description



Detail – Resources, Target Audience, Communication, etc.



Detail – Resources, Target Audience, Communication, etc.



Detail – Resources, Target Audience, Communication, etc.

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Success Metric

###

Success Metric



Initiative #2

Description



Detail – Resources, Target Audience, Communication, etc.



Detail – Resources, Target Audience, Communication, etc.



Detail – Resources, Target Audience, Communication, etc.

###

Success Metric

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Success Metric



Initiative #3

Description



Detail – Resources, Target Audience, Communication, etc.



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Success Metric

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Success Metric

Strategic Priority #2

Deep Dive



Initiative #1
Description

- ✓ Detail – Resources, Target Audience, Communication, etc.
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Initiative #2
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Strategic Priority #3

Deep Dive



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