

PROPOSAL

Strategic Planning: From Mission to Measurable Impact

A four-part virtual workshop series helping nonprofit leaders clarify their direction, make informed choices, and turn strategic priorities into accountable action.

FOUR CORE SESSIONS · TWO OPTIONAL · 45-MINUTE SESSION FREE

Why this, and why now

Most strategic plans do not fail in the writing. They fail in the deciding.

Organizations arrive at planning with a mission everyone can recite, a board that approves the document, and no shared method for choosing between good options. A year later the plan sits unopened, and each new opportunity is argued from scratch.

This series is built to change that.

Over four sessions, participants move from clarifying purpose to naming the strategic questions their organization must answer, choosing priorities against explicit criteria, and building the implementation plan and scorecard that keep those choices visible.

WHAT WE PROPOSE

A four-part virtual workshop series delivered to a cohort of nonprofit leaders. Each session pairs brief instruction with facilitated discussion and guided application, so participants build real material for their own organization as the series runs instead of taking notes to apply later.

Format	Four 90-minute sessions, totaling six instructional hours.
Audience	Nonprofit executive directors, founders, board members, and program leaders.
Approach	Brief instruction, facilitated discussion, nonprofit examples, and guided application to participants' organizations.

THE FOUR SESSIONS AT A GLANCE

PART 1	Establish the Foundation <i>What must we clarify before we begin planning?</i> Takeaway: Planning charter and initial stakeholder map
PART 2	Understand Your Organization <i>What is happening inside and around us, and what requires a strategic response?</i> Takeaway: Preliminary SWOT and two or three draft strategic issue statements
PART 3	Set Your Direction <i>What will we focus on, and how will we choose our approach?</i> Takeaway: Draft priority framework, one developed goal and strategy, and an approval pathway
PART 4	Put the Plan to Work <i>How will we organize the work and know whether we are making progress?</i> Takeaway: Initial 90-day action plan, draft performance scorecard, and review schedule

What this solves for your foundation

You have already invested in the organizations in this cohort. This series protects that investment by strengthening how each grantee decides, plans, and reports.

THE PROBLEMS IT SOLVES

Grantees say yes to everything

THE PROBLEM Opportunities that don't fit stretch staff and pull organizations away from the work you funded.

WHAT CHANGES The Decision Criteria Matrix and Part 3 give grantees a way to test each opportunity against their priorities before they commit.

Reports show activity, not results

THE PROBLEM Grantees report counts because they never defined what success looks like.

WHAT CHANGES In Part 4, each organization builds a performance scorecard with indicators, data sources, and owners.

Growth outpaces capacity

THE PROBLEM New programs arrive on new funding while staff and systems stay flat, putting every grant at risk.

WHAT CHANGES Part 2 has grantees assess capacity honestly and name the gap as a strategic issue before it becomes a crisis.

Dependence on a single funder

THE PROBLEM Many grantees rely on one grant, often yours, to cover core operating costs.

WHAT CHANGES The series brings that risk into the open and has leadership plan for it directly.

Turnover erases progress

THE PROBLEM When an executive director or board chair leaves, decisions leave too, and you start over.

WHAT CHANGES Grantees document priorities, decisions, and a review schedule that outlast any one leader.

Plans that sit on a shelf

THE PROBLEM Strategic planning you may have funded before produced a document, not a change.

WHAT CHANGES Implementation planning in Part 4 and the Keeping the Plan in Use session focus on the months after adoption, when plans usually stall.

THE VALUE TO YOUR FOUNDATION

- **Protects grants already made.** Stronger decisions at the grantee level mean your funding goes further.
- **Better information back to you.** Clear priorities and scorecards make reports, site visits, and renewals more useful.
- **Capacity building that scales.** One series serves your whole cohort at once, instead of one organization at a time.
- **Realistic results for your board.** We state plainly what grantees finish with, so you can report outcomes you can stand behind.

Before the plan, and after it

The core series builds a plan. These two sessions address the two moments where plans most often fail: before, when an organization already has a plan that isn't working, and after, when a new plan is finished and everyone moves on. Either can be taken with the series or on its own.

ADD-ON · BEFORE YOU BEGIN · FREE

45 minutes · virtual

Your Strategic Plan Shouldn't Sit on a Shelf

For organizations that already have a strategic plan.

ADD-ON · AFTER THE PLAN

90 minutes · virtual · 60–90 days after Part 4

Keeping the Plan in Use

For organizations that have just completed a plan.

WHAT PARTICIPANTS FINISH WITH, STATED PLAINLY

Participants finish the series with a working strategic planning foundation, draft priorities, and an initial implementation roadmap. Completing and adopting a full organizational strategic plan will require additional stakeholder input and leadership decisions beyond these workshops. We say this plainly at the outset so the expectations set with boards and funders are accurate.

Establish the Foundation: Purpose, People, and Planning Readiness

What must we clarify before we begin planning?

Participants examine why their organization needs a strategic plan, who should participate, and how its mission and obligations guide strategic decisions.

WORKSHOP TOPICS	WHAT YOU WILL BE ABLE TO DO
<ul style="list-style-type: none">■ Strategic planning and its connection to everyday management.■ Planning readiness, leadership sponsorship, and decision-making roles.■ Organizational mandates: what the organization is required or expected to do.■ Mission, values, and the community benefit the organization exists to create.■ Stakeholder identification and meaningful participation.	<ul style="list-style-type: none">■ Define the purpose, scope, and intended results of your planning process.■ Identify the people who should lead, contribute to, and approve the plan.■ Distinguish organizational obligations from discretionary activities.■ Assess whether your mission clearly explains whom you serve and why.■ Outline how staff, board members, participants, and partners will inform planning.

90-MINUTE AGENDA

Welcome and readiness poll
What prompted your organization to plan now?

Strategic planning fundamentals
Purpose, leadership commitment, scope, and decisions.

Mission, mandates, and values
Guided review of what anchors organizational direction.

Stakeholder mapping exercise
Identify affected groups, decision-makers, and missing voices.

Break

Application lab
Draft a planning charter covering purpose, team, responsibilities, timeline, and participation.

Reflections and next steps
Participant reflections, questions, and next steps.

Working takeaway: Planning charter and initial stakeholder map.

Between sessions: Review your mission and existing commitments. Gather your current budget, program results, and available stakeholder feedback.

Understand Your Organization: Evidence, Environment, and Strategic Issues

What is happening inside and around us, and what requires a strategic response?

Participants assess organizational conditions and translate findings into the significant questions their strategic plan must address.

WORKSHOP TOPICS

- Internal assessment: programs, finances, staffing, governance, systems, and capacity.
- External assessment: community needs, funding conditions, policy changes, and partnerships.
- Using stakeholder feedback and organizational data.
- Strengths, weaknesses, opportunities, and threats.
- Distinguishing strategic issues from routine operational concerns.

WHAT YOU WILL BE ABLE TO DO

- Identify the evidence needed to understand your organization's current condition.
- Assess internal capacity and external changes affecting your mission.
- Develop a SWOT assessment grounded in evidence.
- Turn assessment findings into clear strategic questions.
- Identify information gaps that require additional research or consultation.

Example strategic question: "How can we sustain our core services when a single grant funds most of our operating costs?"

90-MINUTE AGENDA

Check-in

Share a finding from your document review or stakeholder conversations.

Organizational assessment

What financial, program, workforce, and governance information matters?

Environmental scan

Examine community needs, funding shifts, and potential partners.

Guided SWOT exercise

Separate documented findings from assumptions.

Break

Strategic issue lab

Convert findings into two or three questions requiring leadership choices.

Group feedback

Group feedback, questions, and next steps.

Working takeaway: Preliminary SWOT and two or three draft strategic issue statements.

Between sessions: Validate your findings with appropriate stakeholders and identify the consequences of leaving each strategic issue unresolved.

Set Your Direction: Priorities, Strategies, and a Shared Vision

What will we focus on, and how will we choose our approach?

Participants practice making strategic choices that reflect their mission, community needs, and organizational capacity.

WORKSHOP TOPICS

- Developing alternative responses to strategic issues.
- Evaluating mission alignment, impact, feasibility, cost, and risk.
- Selecting a manageable set of priorities.
- Distinguishing priorities, goals, strategies, and activities.
- Describing a shared vision of success.
- Building agreement and preparing for formal plan review and adoption.

WHAT YOU WILL BE ABLE TO DO

- Generate multiple approaches to an important strategic issue.
- Compare options using clear decision criteria.
- Explain the trade-offs involved in selecting priorities.
- Draft a goal and strategy that connect to a desired result.
- Identify the review and approval steps needed before implementation.

90-MINUTE AGENDA

Check-in

Review strategic issues and stakeholder feedback.

From issues to choices

Distinguish priorities, goals, strategies, and activities.

Strategy design exercise

Develop alternative responses to one strategic issue.

Prioritization lab

Compare options for mission alignment, impact, feasibility, resources, and risk.

Break

Draft the direction

Write a priority, supporting goal, strategy, and description of success.

Agreement and adoption

Plan stakeholder review and appropriate board or leadership approval.

Questions and next steps

Working takeaway: Draft priority framework, one developed goal and strategy, and an approval pathway.

Between sessions: Refine your proposed priorities with leadership and estimate the people, funding, and partnerships required.

Put the Plan to Work: Implementation, Measurement, and Adaptation

How will we organize the work and know whether we are making progress?

Participants connect strategic direction to responsibilities, resources, performance measures, and regular review.

WORKSHOP TOPICS

- Translating strategies into work plans and milestones.
- Assigning ownership and connecting priorities to the budget.
- Establishing measurable objectives and performance indicators.
- Distinguishing activities, outputs, and outcomes.
- Reporting progress to leadership and the board.
- Reviewing results and adapting strategies as conditions change.

WHAT YOU WILL BE ABLE TO DO

- Translate one strategic priority into a practical implementation plan.
- Assign an accountable owner, timeline, and resource requirements.
- Define a measurable objective and indicators of progress.
- Specify data sources, reporting frequency, and responsibility for measurement.
- Establish a review process for addressing delays and adjusting direction.

90-MINUTE AGENDA

Check-in

Review draft priorities and implementation concerns.

Execution fundamentals

Ownership, resources, dependencies, milestones, and budget alignment.

Implementation lab

Build a 90-day action plan for one priority.

Measurement fundamentals

Objectives, outputs, outcomes, baselines, and targets.

Break

Scorecard exercise

Select indicators, data sources, owners, and reporting frequency.

Review and adaptation

Practice a board progress discussion and establish a review schedule.

Close

Final questions, evaluation, and participant commitments.

Working takeaway: Initial 90-day action plan, draft performance scorecard, and review schedule.

Your Strategic Plan Shouldn't Sit on a Shelf

We already have a plan. Why isn't it working?

For organizations that already have a strategic plan.

Not every organization needs to build a plan from scratch. Many have one that was written carefully, approved by the board, and has not informed a decision since. This session diagnoses why and gives leaders two tools they can use on the plan they already have.

WORKSHOP TOPICS

- Why a completed plan still fails to guide decisions.
- A live teardown of one nonprofit's situation and the choice it could not make.
- The "So what?" test, and the four ways a SWOT quietly fails.
- The Decision Criteria Matrix: scoring an opportunity against stated priorities.
- Organizational memory: deciding once, and remembering that you did.

WHAT YOU WILL BE ABLE TO DO

- Identify why an existing plan is not shaping decisions.
- Pressure-test your own SWOT with the "So what?" test.
- Score a live funding or program opportunity against your stated priorities.
- Explain to a board what the organization will not do, and why.
- Judge whether your organization needs a refresh or a full planning process.

45-MINUTE AGENDA

The shelf problem

Why a finished plan still fails, and what a strategic system does instead.

A nonprofit you will recognize

Programs up 250% in three years, staff capacity flat, and a funding opportunity nobody can decide about.

SWOT teardown and the "So what?" test

The four pitfalls that make an accurate SWOT useless.

The Decision Criteria Matrix

Scoring a real opportunity, and why a funded expansion was declined.

Five principles and what to do Monday

Working takeaway: A Decision Criteria Matrix template and a "So what?" test run against your own plan.

Scheduling: Works as a standalone session or as an entry point before Part 1. It helps an organization judge whether it needs a full planning process or a focused refresh.

Keeping the Plan in Use

The plan is written. How do we keep it off the shelf?

For organizations that have just completed a plan.

The risk is highest right after adoption. The document is finished, the planning energy is spent, and daily operations resume. This session is deliberately scheduled 60 to 90 days later, once reality has tested the plan, to turn it from a document into a working decision system.

WORKSHOP TOPICS

- Reviewing the first 90 days against the action plan: what moved and what did not.
- Reading the scorecard honestly, including indicators that were wrong.
- Running the Decision Criteria Matrix against an opportunity that arrived since adoption.
- Documenting decisions so they survive staff and board turnover.
- The quarterly review rhythm and the board progress conversation.
- Adjusting priorities as conditions change without abandoning them.

WHAT YOU WILL BE ABLE TO DO

- Assess progress against your own 90-day action plan and explain the variance.
- Revise indicators that did not measure what you needed.
- Apply your decision criteria to a real opportunity in front of you now.
- Record strategic decisions so the next leader inherits the reasoning, not just the conclusion.
- Establish a quarterly review rhythm your board will actually sustain.

90-MINUTE AGENDA

Ninety days on

Each organization reports what moved, what stalled, and what surprised them.

Reading the scorecard

Distinguishing a failing strategy from a badly chosen indicator.

Live decision lab

Score a real opportunity that has arrived since the plan was adopted.

Break

Organizational memory

Documenting decisions and the reasoning behind them so they survive turnover.

The board conversation

Practice a quarterly progress discussion, including reporting a missed target.

The review rhythm

Set the schedule, the owner, and the trigger for revisiting priorities.

Working takeaway: A revised scorecard, a documented decision record, and a quarterly review schedule with named owners.

Scheduling: Held 60 to 90 days after Part 4 on purpose. Run immediately, there is nothing yet to review; run much later, the habits have already formed without it.

How the series is delivered

Sessions are scheduled one week apart, with about 30 to 45 minutes of application work between meetings. One continuing nonprofit case example runs alongside participants’ own organizations, supported by breakout discussions and editable worksheets.

THE PARTICIPANT WORKBOOK

Every participant receives a workbook. The templates are the spine of the series. Each session fills one in, and by the final session they assemble into a working planning foundation.

- Planning charter
- Stakeholder map
- Assessment worksheet
- Strategic issue worksheet
- Prioritization matrix
- Implementation plan
- Performance scorecard

THE CAMPBELL APPROACH

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| STRATEGY. | Clarify purpose, assess conditions, and choose priorities intentionally. |
| EXECUTION. | Connect priorities to people, resources, milestones, and accountability. |
| IMPACT. | Define meaningful results, monitor progress, and use evidence to improve decisions. |

WHAT IS INCLUDED

- Four 90-minute facilitated virtual sessions, six instructional hours in total.
- A participant workbook containing all seven working templates, in editable form.
- One continuing nonprofit case example carried across all four sessions.
- Breakout facilitation and guided application to each participant’s own organization.
- Between-session application prompts, 30 to 45 minutes per week.
- A session recording for participants unable to attend live, if the client wants one.

WHAT IS NOT INCLUDED

- Facilitation of the client’s own board or staff planning retreats.
- Drafting, editing, or producing a finished strategic plan document.
- Primary research, community needs assessment, or stakeholder interviewing.
- Individual consulting engagements with participating organizations.