

Keeping Your Strategic Plan Alive

WEBINAR SPONSORED THROUGH THE CDFI FUND
CAPACITY BUILDING INITIATIVE



Delivered by:

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NeighborWorks® America

NeighborWorks® America (NeighborWorks®) is a national nonprofit organization chartered by Congress in 1978. Its mission is to create opportunities for Americans to live in affordable homes, improve their lives, and strengthen their communities. NeighborWorks® has over 25 years of experience providing training and is recognized as the premier provider of training in the affordable housing and community development industry.

Seven Sisters Community Development Group, LLC

Seven Sisters Community Development Group, LLC is a woman- and majority Native American-owned national consulting firm, which offers culturally relevant and innovative strategies, services, and products that create systemic change. Its team of community development experts works with low-wealth and diverse communities across the country, with a particular focus on Native Communities. The team brings a broad range of experience with tribal governments and communities as well as national and local nonprofits, foundations, corporate organizations, and governmental entities.



Webinar Overview

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- **Welcome**
- **Guest Speakers**
- **Challenges to Keeping Your Strategic Plan Alive**
- **Peer Sharing: Cohort Members**
- **Q & A: Cohort at Large**
- **Tips for Keeping Your Plan Alive**
- **Wrap up & Evaluation**

Guest Speakers

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Alan Okagaki

- Community economic development consultant
- Senior Advisor for Growth and Impact Strategies @ Craft 3
- Expert in planning and launch of new community economic development initiatives
- Provides evaluation of development organizations and programs

Adina Abramowitz

- Organizational consultant with broad expertise in the field of community development finance
- More than 20 years of experience in progressively responsible positions in nonprofit management
- Provides strategic, financial, and organizational development consulting services to nonprofit organizations

Strategic Planning

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Challenges to Keeping Your Plan Alive

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- **Competing priorities for limited time**
- **Staff and/or board buy-in**
- **Complexity of plan**
- **Tribal politics**

Peer sharing: Cohort members

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- **Natalie Charley, Taala Fund**
- **Sean Winters, Chi Ishobak, Inc.**
- **Stacey Eagle Elk, Hunkpati Investments Inc.**

Q & A

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**OPEN DISCUSSION WITH OTHER
COHORT MEMBERS.**

Tips for keeping your "Strategic Plan Alive!"

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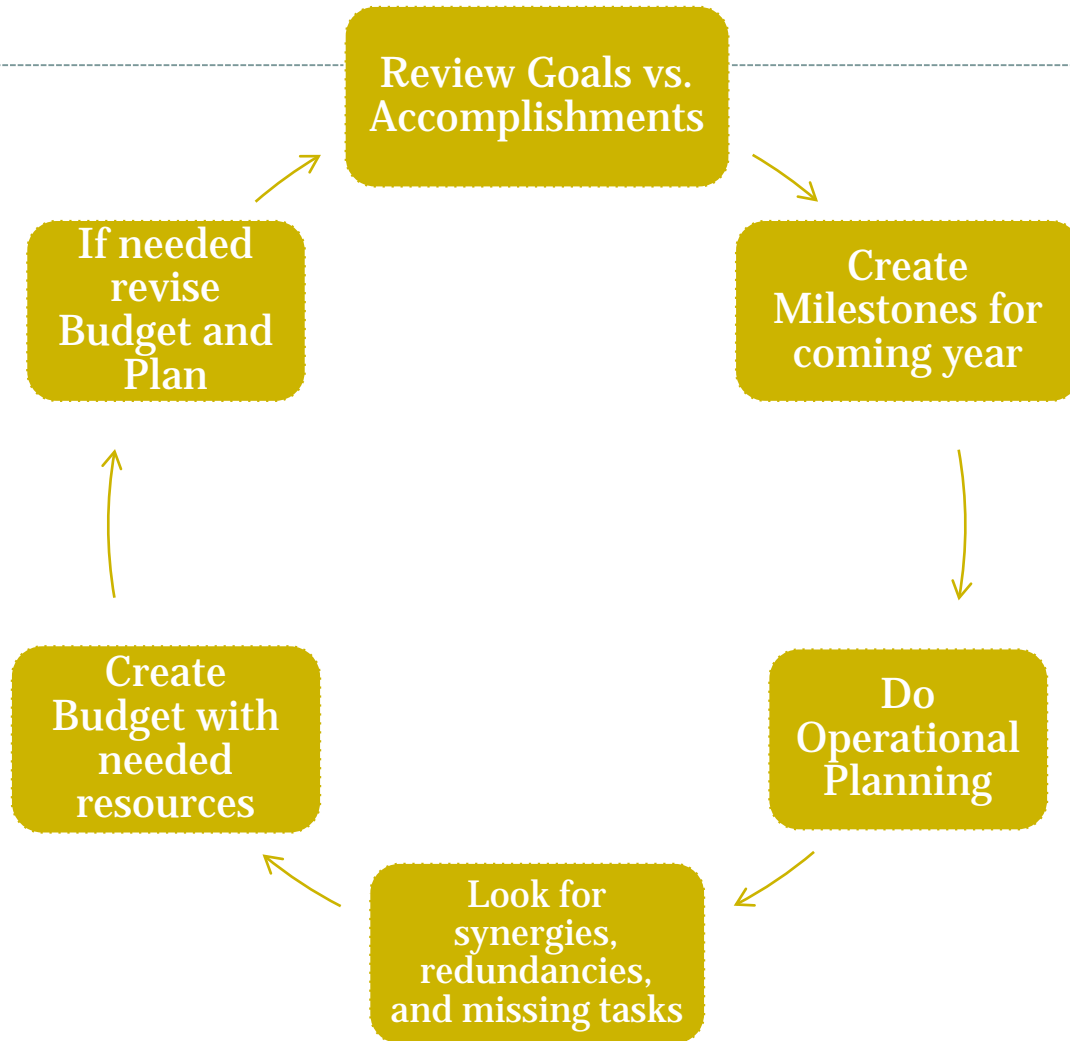
- **For the Board:**

- Organize the Board Agenda around the goals in your plan
- Consider focusing a strategic discussion about one goal in each Board meeting
- Hold an annual meeting to review accomplishments on the plan for the prior year and milestones for the coming year.

- **For the Staff:**

- Do annual operational planning for the upcoming year before developing the budget
- Celebrate successes along the way

Operational Planning Process



If your Strategic Plan is no longer alive (or headed that way)

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- **Be Honest: Why isn't it working?**
- **2 Organizational Cultures:**
 - **Planning & Execution, vs.**
 - **Opportunism & Improvisation**
- **Focus on what you can control; prioritize what's most important.**
- **Planning is a habit and a skill that can be nurtured. Baby steps. Simplify.**
- **Metrics: "What gets measured is what gets done." They communicate what is most important.**
- **Find a format, process and a style that works for you.**

Wrapping Up

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- **Closing reflections**
- **Evaluation**