

Strategic Planning and Goal Management for Nonprofits

Alex Alberti - Triangle Pride Band
Artistic Director



HELLO!



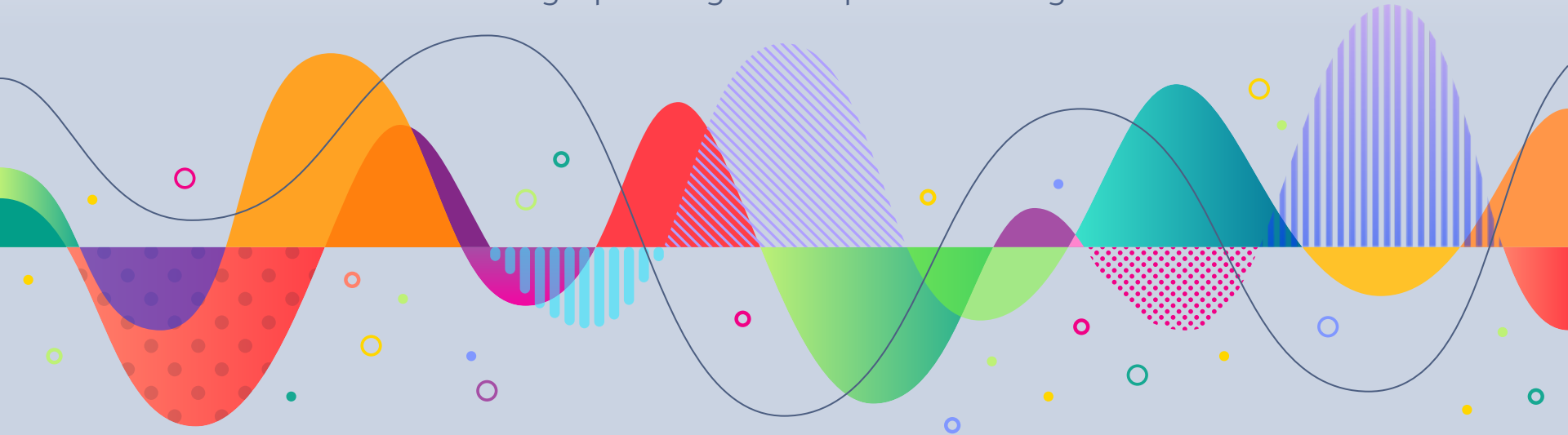
Alex Alberti

Raleigh, North Carolina - Artistic Director - Triangle Pride Band

1.

Strategic Planning

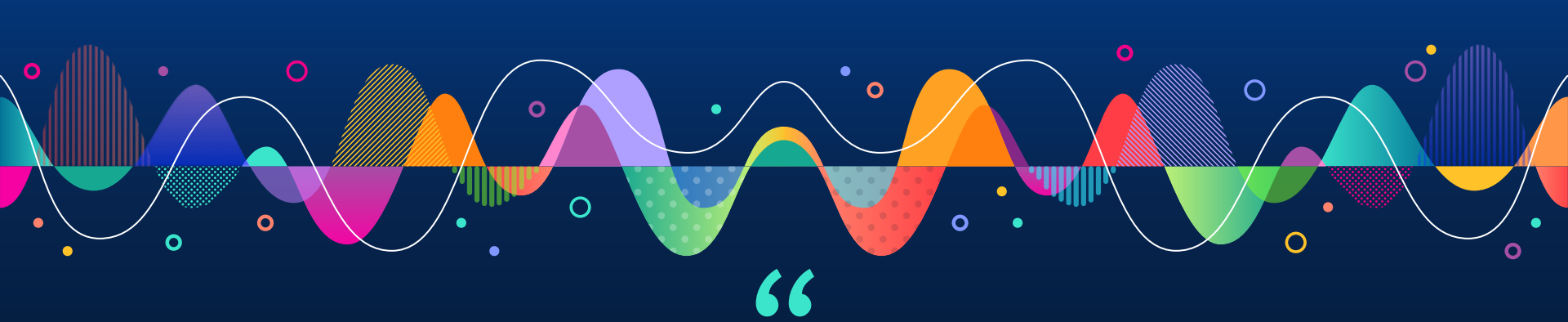
What is strategic planning for nonprofits and organizations?



Strategic Plan

- Your organization's strategic plan is an **actionable vision** for how your programs and nonprofit will evolve and **satisfy its mission**.
 - Start with the end in mind. (Ten years? One year? Six months?)
 - Work backwards from an idealized future to scaffold.
 - Create measurable milestones along the way.
 - Delegate responsibilities to achieve milestones.





A strategic plan is a nonprofit's **roadmap**. A strategic planning process identifies strategies that will best enable a nonprofit to **advance its mission**. Ideally, as staff and board engage in the process, they commit to measurable goals, approve priorities for implementation, and also make a plan to revisit the strategy on an ongoing basis as the internal and external environments change.

Tenets of a Good Strategic Plan



Mission-Aligned

Your strategic plan should, first and foremost, enable you to execute your nonprofit's **mission**. Be wary of mission drift.

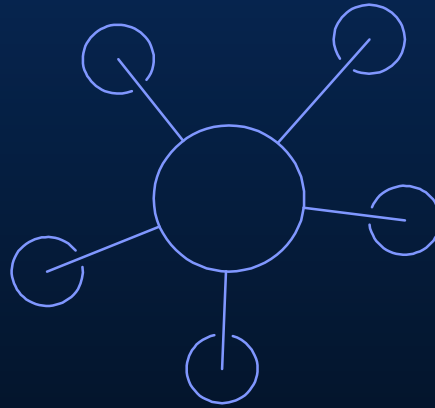
Metric-Driven

How can you **measure** the success of your program's operations? Are there clear ways of understanding if **progress** is being made?

Milestone-Based

Your strategic plan should drive you **forward**. What milestones (**one month; one year; four years**) exist for you to measure against?

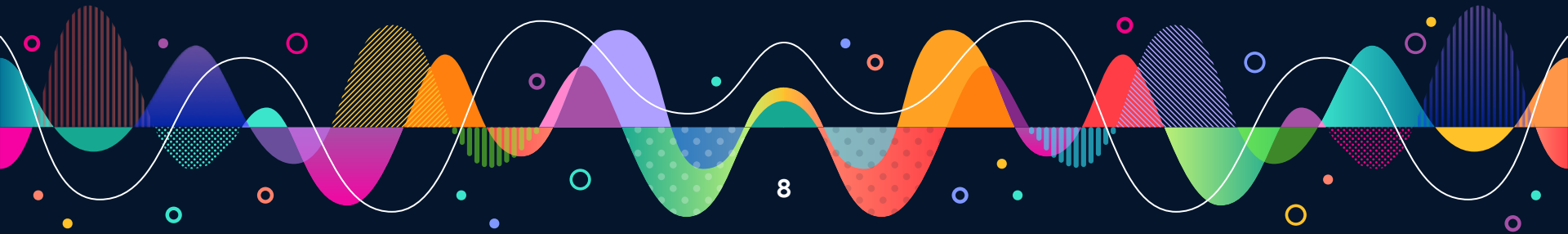
Getting Started



- Mission & Values
- Milestone Planning

Your Mission and Values

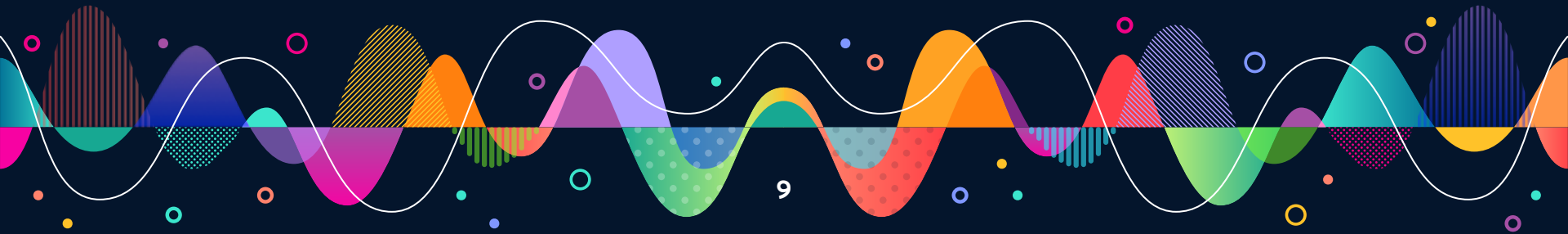
- Nonprofits are driven by their **missions**.
 - A nonprofit mission statement is a one or two-sentence statement describing why your organization exists and what you do.
- **Triangle Pride Band:**
 - The Triangle Pride Band is committed to providing accessible, high quality music experiences to the LGBTQ+ community and their allies in central North Carolina. We aim to strengthen our community through sharing our love of music and promoting social equality, arts education, and queer visibility.



Your Mission and Values

What?

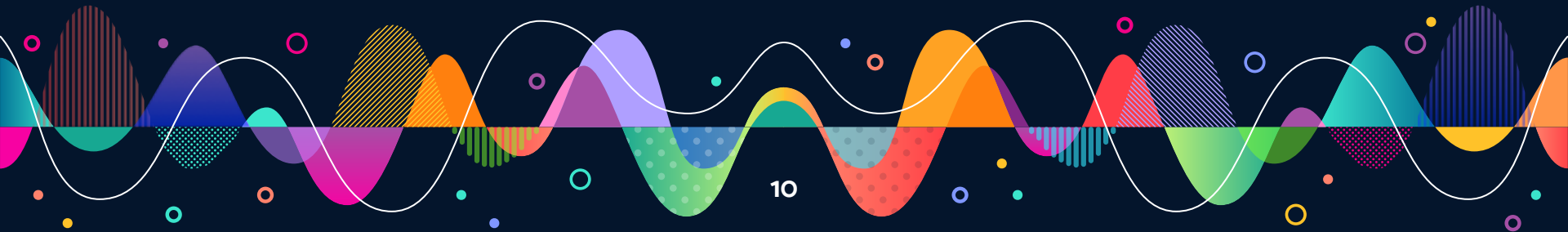
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Your Mission and Values

For who?

The Triangle Pride Band is committed to providing accessible, high quality music experiences to the **LGBTQ+ community and their allies in central North Carolina**. We aim to strengthen our community through sharing our love of music and promoting social equality, arts education, and queer visibility.



Your Mission and Values

- Nonprofits missions are executed in line with its **values**.
- A set of guiding principles that shape the behavior and decision making of a nonprofit.

Triangle Pride Band
Visioning and Strategic Planning
Spring - 2023

- Clarify mission & values (5 minutes)
 - Current TPB Mission: "Our mission is to lift up our community through music in an accepting environment for all."
 - The Triangle Pride Band is committed to providing accessible, high quality music experiences to the LGBTQ+ community and their allies in central North Carolina. We aim to strengthen our community through sharing our love of music and promoting social equity, arts education, and queer visibility.
 - TPB Values:
 - Accommodation for a range of musical abilities
 - Access and success for anyone in their musical journey and growth.
 - Committing to providing a safe, affirming, and inclusive environment for any gender identity, sexual orientation, age, socioeconomic status, race, religious identity, ethnicity, and ability.
 - Commitment to programming music from diverse and marginalized composers, such as women composers, BIPOC composers, and LGBTQ composers.
 - Engaging our audience with uplifting and affirming performances.
 - Celebrating the joy shared through music.
 - Working with allies.

Your Mission and Values

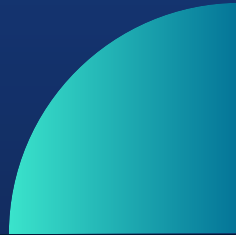
- Triangle Pride Band:

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- Commitment to programming music from **diverse and marginalized composers**, such as women composers, BIPOC composers, and LGBTQ composers.
- Engaging our audience with uplifting and affirming **performances**.
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SWOT ANALYSIS

STRENGTHS - INTERNAL

What does your program do well? What are your best assets and resources?



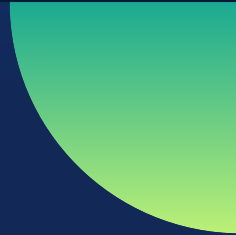
WEAKNESSES - INTERNAL

Where does your organization struggle? Where do we lack resources? What growth needs to happen?



What needs exist in the larger community? Where does your organization fulfill a purpose best?

OPPORTUNITIES - EXTERNAL

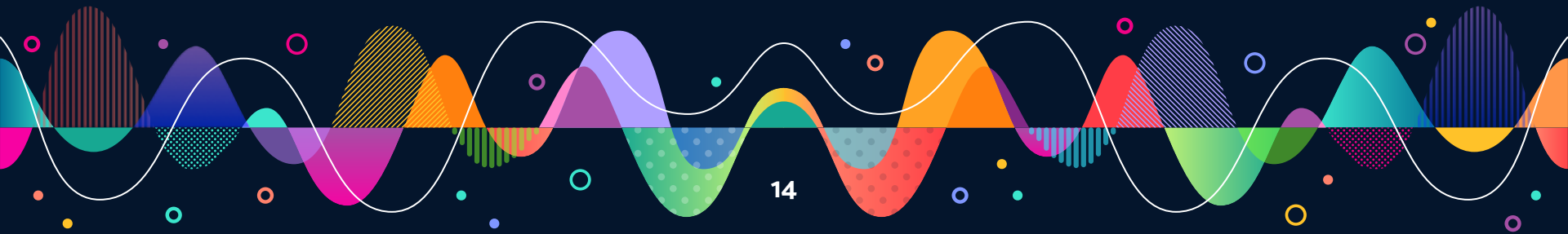


Where is there competition? Are there limited resources being poached by other organizations?

THREATS - EXTERNAL



Visioning



Visioning

- The process of creating a **long-range, idealized vision** of your program's trajectory.
 - Start with the **end in mind**.
 - Strategic planning will involve working backwards from the end.

New:

- o **Triangle Pride Band Vision/Goals in 1 Year: (March 2024)**
 - **Grow and strengthen ensembles**
 - Growth:
 - o Increase levels of membership in smaller or newer ensembles.
 - Small ensemble participation/ownership.
 - Marching/pep bands.
 - o Jazz band:
 - Better balance and instrumentation.
 - Member satisfaction is sustained.
 - Prospect/discover new rehearsal space(s).
 - o Marching ensemble
 - Membership has increased by ~20.
 - Don't need to rely on outside participants to have an event

Ideal Future

- With your board or participating members, create an ideal future for your organization.
 - What does it look like?
 - What programs does it offer?
 - How big is it?
 - How does the organization run and operate?

- **Formalized fundraising and financial planning**
 - Implement practices for donor relations and management.
 - Formal communication process with donors.
 - Email group/tag group.
 - "Thank you for your donation last year of \$X."
...Challenge donors to match or exceed.
 - Grant funding
 - Applied for funding from two grant sources.
 - One state grant.
 - One local grant.
 - Annual fund campaign and stratified donor levels/benefits.
 - **FORMAL**: Established first Gay-la.
 - Culminating event of Annual Fund

Examples:

“We have an established annual fundraiser event.”

“We have three anchor performing ensembles.”

“Our jazz band includes a jazz quintet.”

“Our board has expanded to ten members.”

“We have an annual operating budget of \$50,000.”

A Measurable Future

- Begin your strategic planning process with a goal **1 to 5 years into the future.**
 - Create a set of measurable/actionable criteria, milestones, and goals aligned to your ideal vision.
 - Optional: Group these by committee; theme; type, etc.

“The symphonic band has an active membership of 50+ musicians.”

“Our concerts have an audience of at least 300.”

“Our annual fund raises over \$10k”

“The marching band has new uniforms.”

Considerations:

- What **capacity** does your organization strive for? (Board members, active members, funds, programming, etc.)
- Are your future goals aligned to your **mission**? Is there a potential for mission drift?
- Do your goals address your **SWOT analysis and vision**?

"The symphonic band has an active membership of 50+ musicians."

"Our concerts have an audience of at least 300."

"Our annual fund raises over \$10k"

"The marching band has new uniforms."

Zoom In

- After you have created a year+ plan, begin a **6 month plan**.
 - Create more specific stepping stones to the measurable outcomes from your **1+** year vision.
 - What can be done in six months to get you **closer** to that goal?
 - TIP: Copy and paste your year+ goals and create subgoals for this step.

Jan,
2025

July,
2024

“The marching band has new uniforms.”

We have reached out to four uniform vendors.

\$4k has been raised for new uniforms.

Members have been polled about uniform preferences

1 Month

- Now, create a **1-month** plan
 - Continue the process of iterating on your six-month goals to create actionable and measurable one-month tasks.

Jan,
2025

“The marching band has new uniforms.”

July,
2024

We have reached out to four uniform vendors.

Jan,
2024

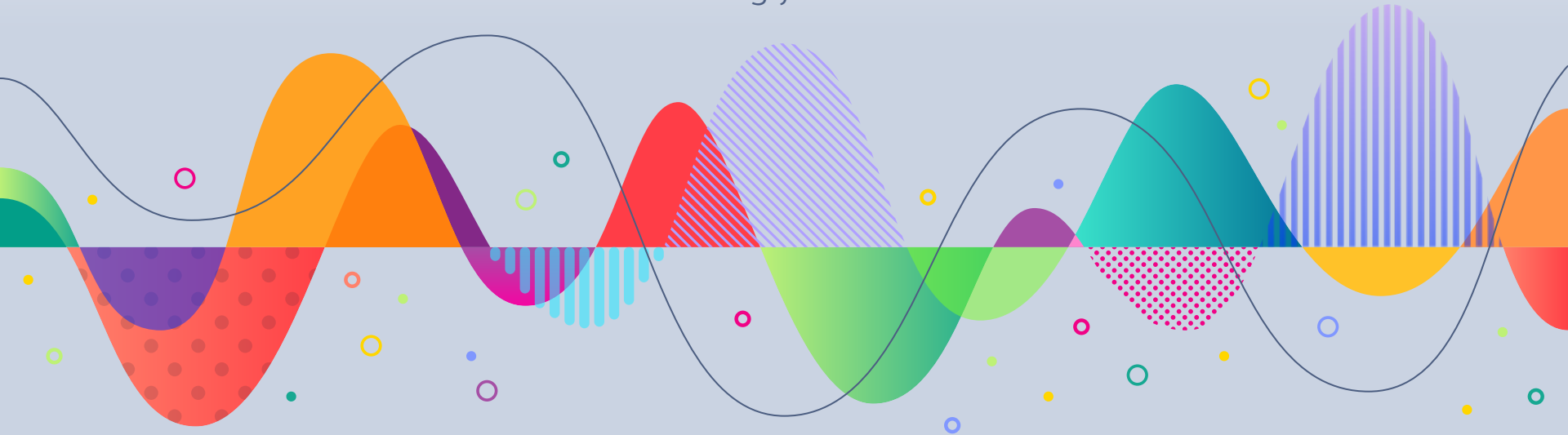
Create a spreadsheet of potential uniform vendors.

Contact two other pride bands about where they purchased their uniforms.

2.

GOAL MANAGEMENT

Executing your vision.



Goal Management



Now that your organization has completed a strategic plan, it's time to make the plan **actionable**.

ClickUp



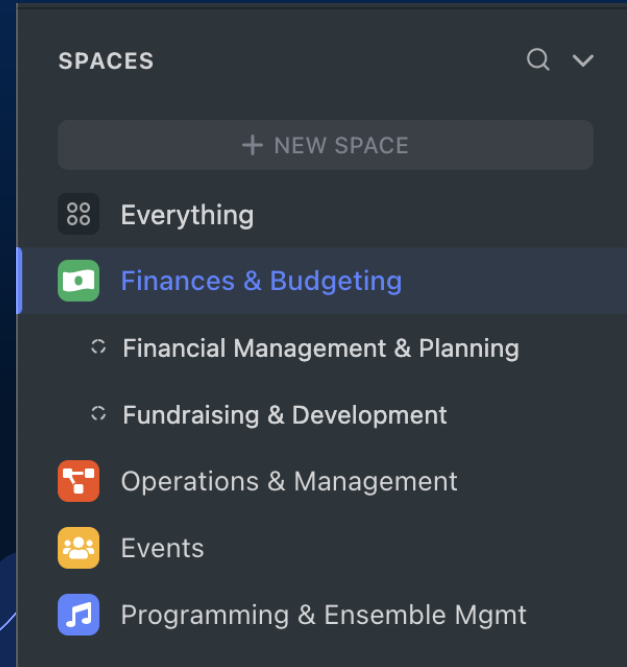
- The Triangle Pride Band has implemented the use of a project management software called **ClickUp**. (free plan)
- Allows organizations to create tasks, subtasks, manage goals, assign, comment, collaborate, and track progress.



What does ClickUp do?



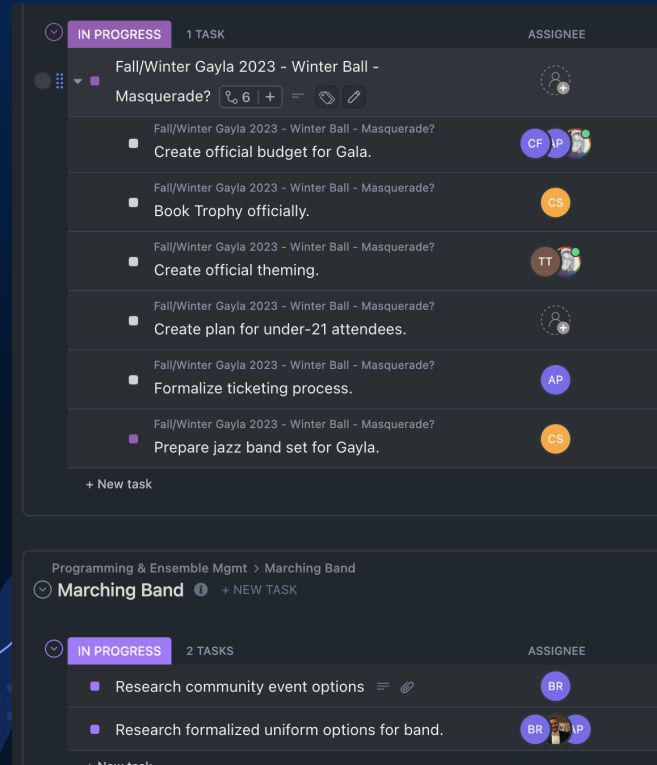
- ▶ Create committee or board function-related “Spaces” for tasks and events.
- ▶ Spaces are subdivided into Lists.



What does ClickUp do?



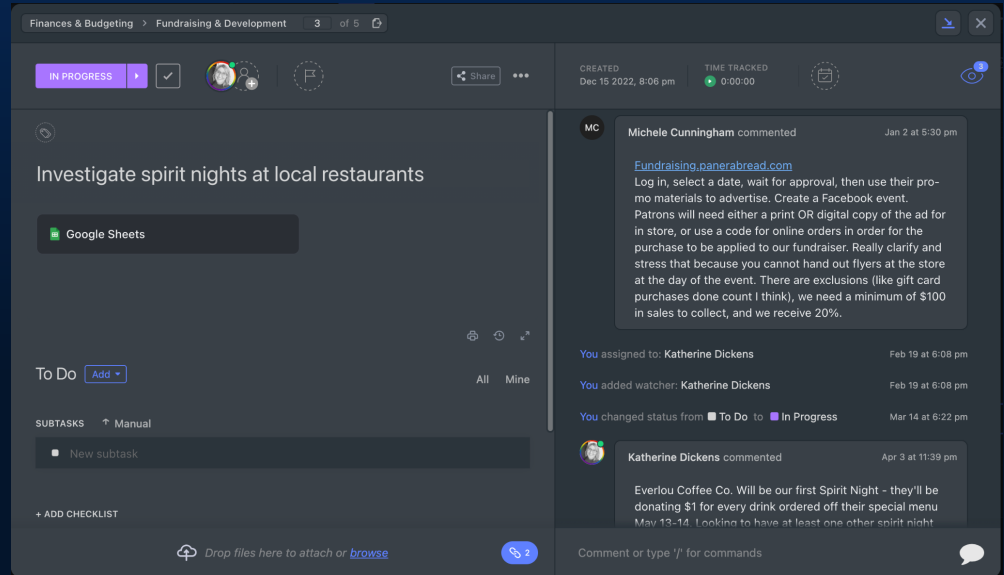
- ▶ Track the statuses of tasks, sub-tasks, projects, and initiatives.
- ▶ Assign individuals responsibilities and deadlines within tasks.



What does ClickUp do?



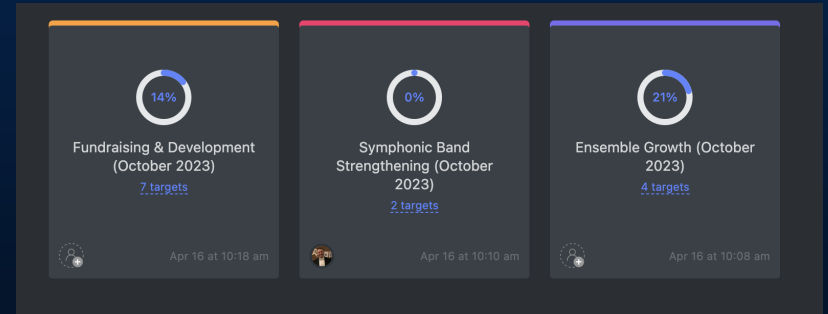
- ▶ Create individual tasks and track statuses, progress, documents, and communicate within task pages.
- ▶ Tagging, subtasks



GOALS in ClickUp



- Create a set of goals tied to (a) milestones, (b) tasks, and (c) deadlines.



GOALS in ClickUp



- Use the Goals function to keep up with the pace of strategic planning milestones and events.

The screenshot shows a ClickUp goal card for 'Fundraising & Development (October 2023)'. The goal is 14% complete. It includes a 'SHARING & PERMISSIONS' button and a user icon. Below the goal card is a 'Targets' section with an '+ Add' button. The targets list includes:

Target Description	Task Count	Progress
Specific fundraising goals established for the end of 2023.	1 task	0/1
Implement practices for donor relations and management.	1 task	0/1
Financial statements are prepared and formalized for grant submission/presentation.	1 task	0/1
Create stratified donor levels and benefits.	1 task	0/1

GOALS in ClickUp



- Tie the outcomes of sub-goals to specific tasks within ClickUp.

The screenshot displays two goal cards in a dark-themed interface. Each card includes a profile picture, a goal title with a task count and completion status, a timestamp, and a list of tasks with progress bars.

Goal Title	Task Count	Completion Status	Timestamp
Corporate partnership prospecting.	2 tasks	0/2	Apr 16 at 10:18 am
Merchandising enhancements.	1 task	1/1	Apr 16 at 10:18 am

Corporate partnership prospecting. 2 tasks ***
Apr 16 at 10:18 am

- Complete formal presentation process to local corporations.
- Identify one large business for partnership.

Merchandising enhancements. 1 task ***
Apr 16 at 10:18 am

- Public-facing merch for large events.

Alternatives to ClickUp

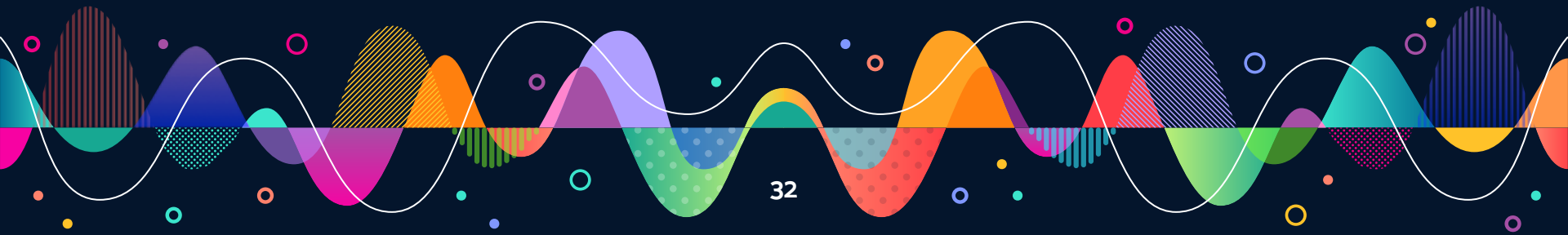


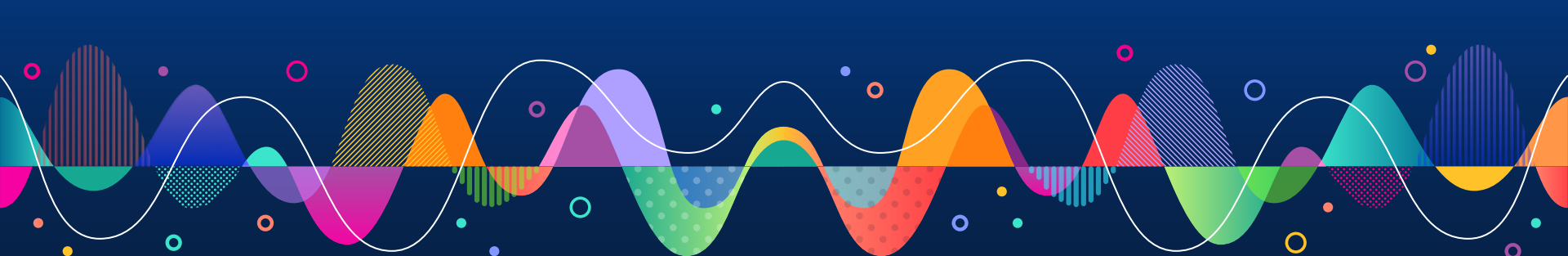
- Monday.com
- Asana
- Notion
- Airtable
- Google Sheets

**The
Strategic
Cycle**



Strategic planning is a
cyclical activity!





“

Complete the strategic planning process every six months, while checking in on progress monthly at board meetings.

Considerations:



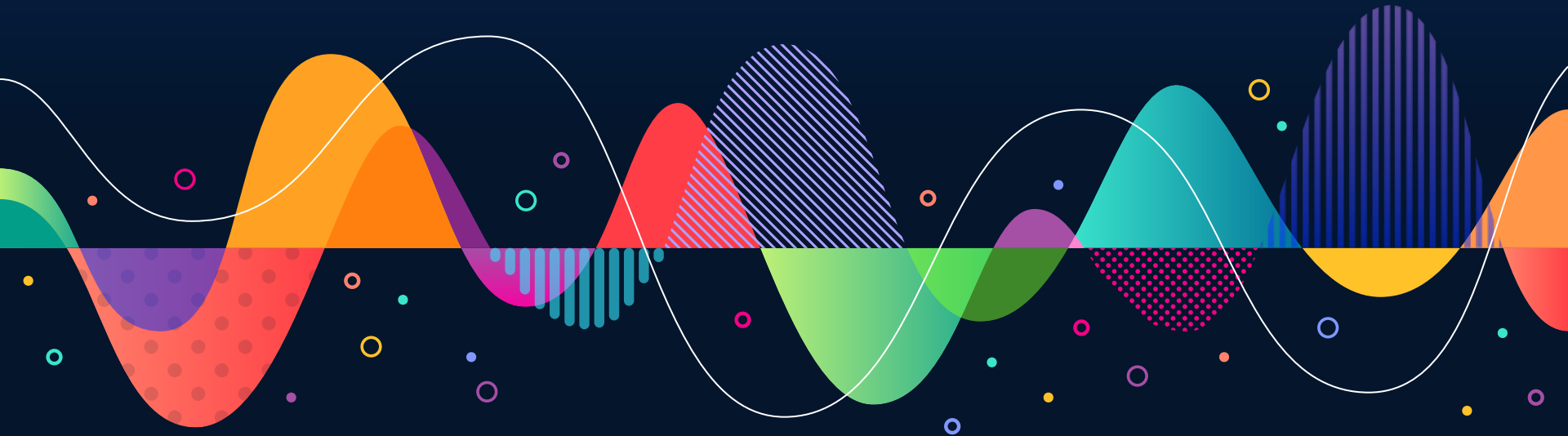
- Are we meeting **deadlines** in accordance with our strategic plan?
 - Do we need to **adjust** our timing?
- Are we adding **unnecessary** tasks that are removing focus/effort from mission-aligned goals?
- Is the distribution of **labor balanced** among board members?

Implementing ClickUp in Board Activities



- Create **user accounts** for board members.
- Create a Spaces structure that reflects the organization of your operations.
 - NOTE: Only 4 spaces included in free version of ClickUp.
- **Import strategic plan** goals, deadlines, and assignees into ClickUp.
- Comment/**execute tasks asynchronously** in task chatter.
 - Save time in board meetings.
- **Run** down ClickUp in board meetings.
- Hold **board retreats** every three to six months to review and adjust strategic plan based on goal progress.

ClickUp Walkthrough



Comments, Q&A

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