# Stewards of a Vision

## Tools for Creating, Executing, and Evaluating Impactful Strategic Plans

**Presenter: Daniel J. Prohaska, MA, CFRE, President & CEO, Lions Vision Services**

“It’s kind of fun to do the impossible.”

Quote by Walt Disney

# Agenda & Overview

What do you want to leave with today?

* The structure of a 3-Year Strategic Plan
* The process of creating a Strategic Plan
* The role of input
* The power of responsibility
* Leveraging for fundraising opportunities
* Objections, pitfalls, obstacles, and setbacks
* Additional resources

# The Structure

## Creating a 3-Year Strategic Plan

# Key Terms

## Ensure Clarity & Understanding

Goal: 3-5 broad primary outcomes

Strategy: Approach you take to achieve a goal

Objective: Measurable step to achieve a strategy

Action Item: Specific tasks and deadlines to complete

# SWOT Analysis

Strengths

Weaknesses

Opportunities

Threats

# The Process

## Creating a 3-Year Strategic Plan

# Input

## Engaging Stakeholders

# Responsibility

## Empowering Your Board

# Key Roles of the Board

Set and manage expectations

* Set Organizational Direction
* Provide Oversight
* Ensure Necessary Resources

# Board Member Duties

1. Determine mission and purpose.
2. Hire, fire, and manage the President/CEO’s performance.
3. Protect assets – legal and fiduciary responsibilities.
4. Set strategy and advance the mission.
5. Govern – make the easy and hard decisions as a board.
6. Be ambassadors.
7. Ensure adequate resources = introduce, give, and get.
8. Set organizational metrics and measure success.
9. Be self-perpetuating.

10.Be an active board member.

# Determine Mission and Purpose

Ensure the mission is focused and well understood

* Why does the organization exist?
* Why would it matter if we didn’t exist?
* What do we do better than any other organization of its kind?
* Are you in personal alignment with the mission and purpose?
* Avoid mission creep.

# Set Strategy and Advance the Mission

* Strategic direction is the purview of the Board
* The board should eat, sleep, and breathe the strategic plan.
* Use the strategic plan to guide your decision making.
* Donors rally around a vision that is steeped in sound strategy.
* The board sets the strategic vision, and then works hand in hand with the staff team to implement it.

# Set Organizational Metrics & Measure Success

You cannot achieve what you cannot measure

* Your fundamental role is to ensure that the organization is achieving its mission and vision, in alignment with your strategic plan.
* Use SMART goals (Specific, Measurable, Achievable, Relevant, Time-Based).
* Stay focused on the goals and strategies, enable staff to focus on the objectives and tactics.

# Fundraising

## Inspiring Philanthropists

# Individual Donor Cultivation Plan Template

Graphic showing information on the donor, their connections and previous actions

# Donor Discussion Guide

Graphic chart the kind of topics to discuss with potential donors during a meeting

# Mitigation

## Preparing for Setbacks and Obstacles

# Resources

## Ask powerful questions