

Beyond Strategic Planning: The Case for

Integrated Planning

Sam Frank
Synthesis Partnership

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Topics

Integrated Planning Overview

Major Planning Areas

- Strategic Planning
- Program Planning
- Business Planning

Other Planning Areas

- Organizational Development
- Identity and Branding
- Advancement Planning
- Human Resources Planning
- Technology Planning
- Facility Planning

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Strategic Planning

Development of direction, focus and consensus

Process:

- Prepare
- Assess
- Engage
- Plan
- Implement

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Why Plan?

Circumstance

- Change happens

Operations

- Dismiss distractions
- Develop critical metrics
- Build the case for fundraising

Wisdom

- The obvious is often wrong
- Multiple perspectives add value
- Get out of comfort zone

Cultivation

- Develop strategic thinking
- Empower stakeholders
- Build connection and enthusiasm.
- Improve understanding of organization and role
- Develop board and leadership

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Strategic Planning:

I. Prepare

Get governing board commitment

Design the process

Develop work plan and timeline

Appoint planning committee chair

- Understanding of planning and governance
- Leadership and management skills
- Willing and able to commit the needed time
- Future leader

Select committee members

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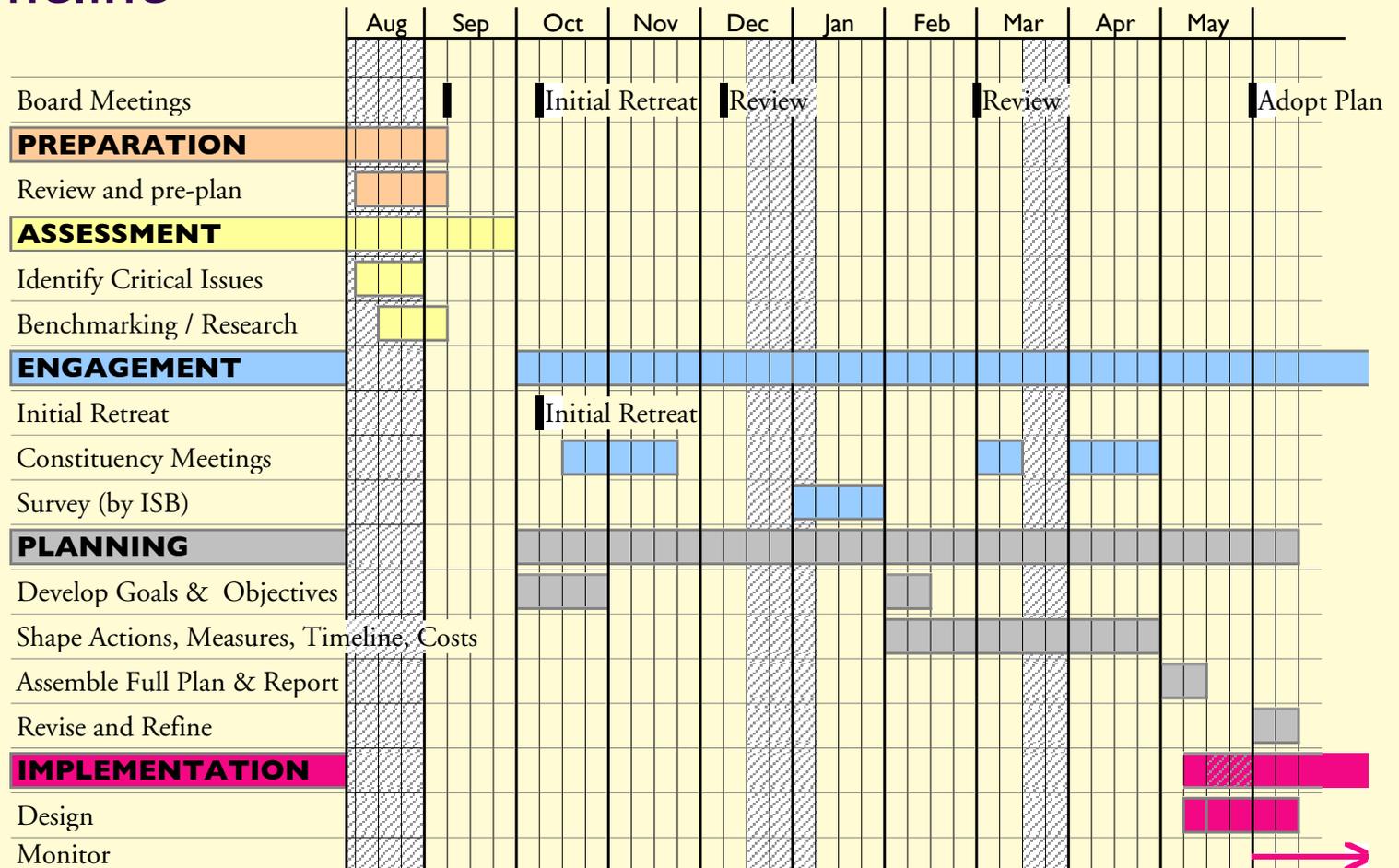
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Strategic Planning:

I. Prepare

Typical Timeline



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Strategic Planning:

2. Assess

Assemble documentation

Identify critical issues

Gather data (benchmarks, trends)

Define resource requirements through component plans

- Business
- Program
- Advancement
- Membership
- Human resource
- Technology

Conduct a board self-assessment

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Strategic Planning:

3. Engage

Conduct an opening retreat

- Governing board
- Senior staff
- Planning committee
- Others

Draw all stakeholders into the process

How (based on culture, circumstances, situation)

- Meetings (interactive)
- Surveys (quantitative)
- Focus groups (qualitative)

What

- Gathering *and dissemination* of ideas among critical constituencies
- Feedback

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Strategic Planning:

4. Plan

Start from mission

- Broad mission-based goals
- More focused supporting objectives

Obtain board endorsement

—and begin to transfer ownership to the board

Assemble a full draft

- Cross-category action items
(measurable, scheduled, assigned, budgeted)
- Examine for ambition, achievability, balance
- Cross check

Adjust and prioritize the plan

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Strategic Planning:

4. Plan

Public Plan

Dedication to Excellence

Goal 1

St. George's will operate as a single school in pursuit of its mission.

To preserve St. George's unique culture and to ensure that the school stays true to its mission and provides consistent quality and efficiency in the delivery of that mission, the school must operate as a single entity with a focus on understanding the value of inter-relatedness and diversity in providing a rich learning environment for students.

Objective 1

Ensure that learning experiences across all campuses are student-centered and prepare students for a diverse global world by providing the opportunity for authentic discovery of ideas and skills in order to foster a love of learning.

The student experience – whether in the classroom or in an after-school or summer program – is at the core of a St. George's education. Through goal-setting, reflection, and teacher comments, students at all levels will be guided to an understanding of the learning process and a love of learning for learning's sake.

Objective 2

Develop an understanding among the St. George's community of the value of excellence in education created by the St. George's model.

The St. George's model is not just an added value of the school, it is an essential feature of the St.

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Strategic Planning:

5. Implement

2y Strategic Plan Framework → draft November 28, 2007

Program: Access

Mission-Based Goal: → Offer access to resources for young adult with cancer, their families, and their care providers

Supporting Objective 1: → Upgrade the website to the state of the art, with powerful capabilities

Action Item	Measurable Result
1 Increase technology to web 2.0	Updated website with state of the art technology
2 Website translated into Spanish	Link to connect people to the translated website
3 Up-to-date resources/links/support on site	i2y site becoming a larger resource for more people, greater hits
4	

Implementation of Action Items

Begin	Complete	Resources required	Responsibility
1 TBD	TBD	Funding/web engineers	Exec Director
2 11/06/07	TBD	N/A	YALC chair
3 TBD	TBD	Funding/someone to update site regularly	YALC chair
4			

Supporting Objective 2: → Develop a robust presence in cancer treatment centers

Action Item	Measurable Result
1 Gain a presence in all 63 NCI cancer centers	Have i2y literature easily available in all NCI centers; make appointments and meeting at cancer centers
2 Reach out to over 200 affiliates/hospital contacts on record	Have literature available and emails/calls back and forth, personal relationships
3	

Implementation of Action Items

Begin	Complete	Resources required	Responsibility
1 12/01/07	End of 2008	Time, phone/internet/\$\$\$	YALC chair
2 12/01/07	End of 2008	Time, phone/internet/\$\$\$	YALC chair
3			

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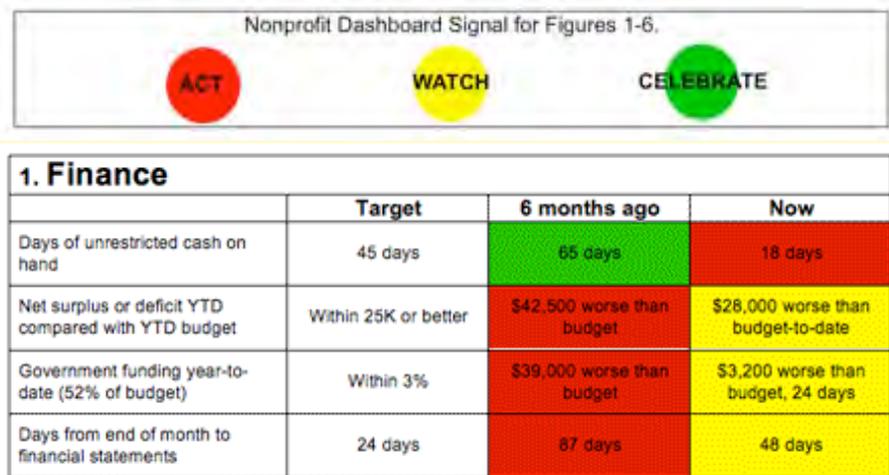
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Strategic Planning: Dashboards

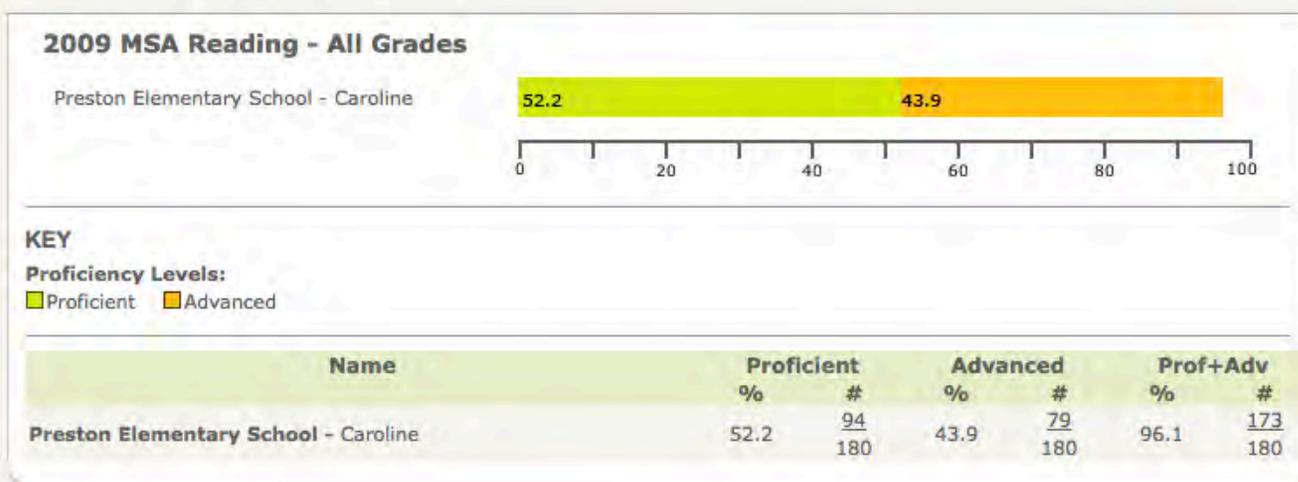
5. Implement



from *Blue Avocado* (<http://www.blueavocado.org>)

2. Program and Impact			
	Target	6 months ago	Now
Number of first-time clients enrolled	360 this year	160	205
GED certificates obtained	90%	70%	82%
E-petition signatures	5,000	Not started yet	6,400
Paid seats per theatre performance	90% of performance space	85%	75%
Presentations to churches, companies, neighborhood groups	15 for year	7 YTD	7 YTD

5. Fundraising			
	Target	6 months ago	Now
New foundations or corporations	10 this year	6	8
New individual donors	100	11	82



from
Maryland Report Card

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Program Planning

Mission-based Goals

Description of Programs

Program Objectives

- What's essential?
- What's distinctive?
- What are the challenges?
- What improvements are needed?
- What resources will be required to make them?

Organizational Structure

Resources

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Program Plan

Approaches

Educational Pro

Strategic Goals: Responsible and Integrated Curriculum; Independent thinkers, etc...

Global Scholarship / Citizen Education for a global perspective understand her or his community effective judgments. It includes including our own and others...(

- o Multicultural Education &
- o Comprehensive World La
- o Conflict Resolution / Med
- o Environmental Responsib
- o Local and International C
- o International Study and T

Integrated / Interdisciplinary
Integrated curriculum is...educational subject-matter lines, bringing to meaningful association to focus teaching in a holistic way and re (1985).

- o Cross-curricular projects
- o Cross-divisional coordin
- o Authentic Investigations
- o Thematic Focus

Character Education
Character education is about de

School Model
Notes as of October 20, 20

Goals for the

1. To define a school-wide model
 2. To articulate how this model
 3. To identify a plan to fully
- The Model can be
The Model can be
will likely be seen as an extra

1. The Model

- The Model develops
- **understanding** of how he
 - **self-advocacy** –taking own
 - o developing a curious
 - o pursuing answers by s
 - o utilizing a range of sk
 - thoughtful and responsible
 - **initiative** to meet the need
 - individual **passions** and in
 - mature **independence, cri**

- As an institution, it implements
- a strong partnership between
 - a developmentally appropriate
 - diverse learning experiences
 - experiential learning opportunities
 - active participation of students
 - a dynamic mentoring relationship
 - providing leadership instruction
 - recruitment, hiring and retention with their craft
 - preserving a small, close community
 - making use of our unique

2. The Model is expressed in each division based on the social developmental needs of its students.

In Lower School the Model differentiates by:	Other critical features of Lower
<ul style="list-style-type: none"> • Emphasis on core values and character development: Respect, Responsibility and Service using the LS Motto: Treat Others As You Would Like To Be Treated • Differentiated learning opportunities in math and reading • Outdoor experiential science program that uses the campus as a classroom • Emphasis on interdisciplinary teaching and learning • Experiential learning opportunities (4th and 5th grade Explorations program, Gr. 2-5 attendance at the opera, Great Impressions Program) • Cross divisional experiences • Morning Tradition/LS assemblies • Emphasis on development of public speaking skills 	<ul style="list-style-type: none"> • Strong communication between home and school • Foreign Language program • Community service program • Strong arts program including: Arts Week, Musical, Grand Friends Day program, Showcase, Puddles • Comprehensive Writing program (Writing Celebration) • Strong Early Childhood program
In Middle School the Model differentiates by:	Other critical features of Middle
<ul style="list-style-type: none"> • A variety of classroom settings (Harkness, lab, shoreline, traditional classrooms) • 8th grade expositions • Strong environmental program (Enviro-Week, Alton Jones winter program, eel grass project) • World Cultures program • Integration of technology (Blackboard Learning system; computer skill curriculum; media literacy course; emphasis on building ethical, responsible users) • Experiential learning opportunities (Quebec trip, Boston trip, Harkness summit) • Emphasis on core values: Respect, Kindness, Integrity, Responsibility, Service 	<ul style="list-style-type: none"> • Competitive athletic program • Transitional 5th to 6th grade program. • Student Electives program • Strong advisory program • Community service program • Student government
In Upper School the Model differentiates by:	Other critical features of Upper
<ul style="list-style-type: none"> • Harkness program • Student laptop program • Senior seminar • Senior projects/internships • Chewonki wilderness program and Washington, DC field 	<ul style="list-style-type: none"> • Strong advisory program • AP program • Student life, performing arts, and athletic programs • Co-curricular activities

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Business Planning

Market analysis

(market conditions, competition, market share, extra programs, pricing)

Business strategy

(positioning, marketing, competitive advantage)

Business / Financial Goals

(programs and services, staff development, fundraising, investments)

Requirements

(personnel, facilities, technology, risk management)

Organization structure

Financial, investment, development policies/procedures

Financial Statements

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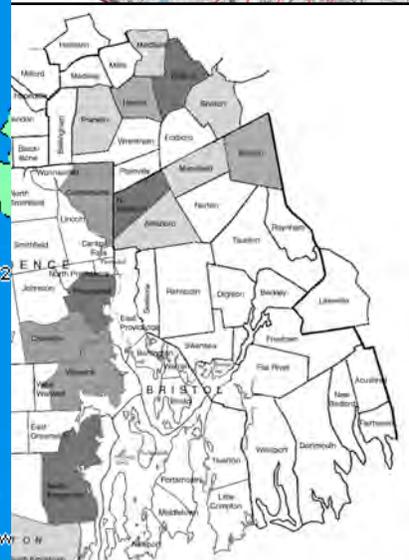
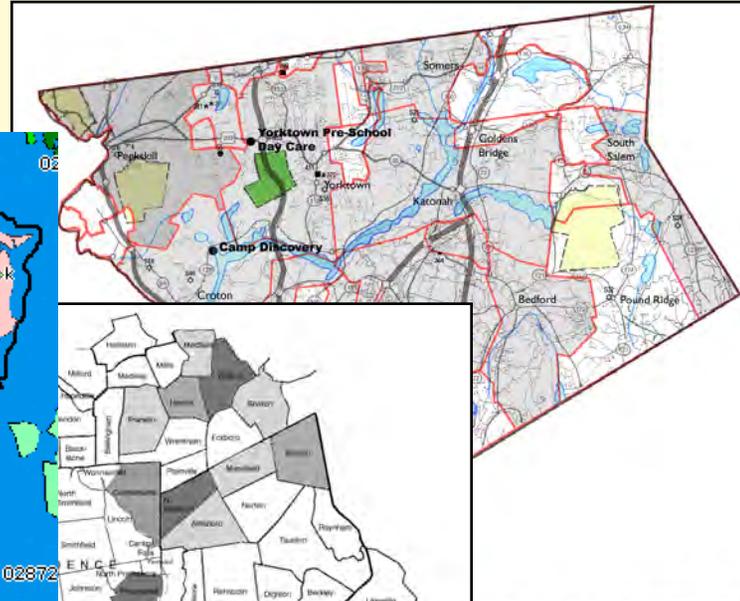
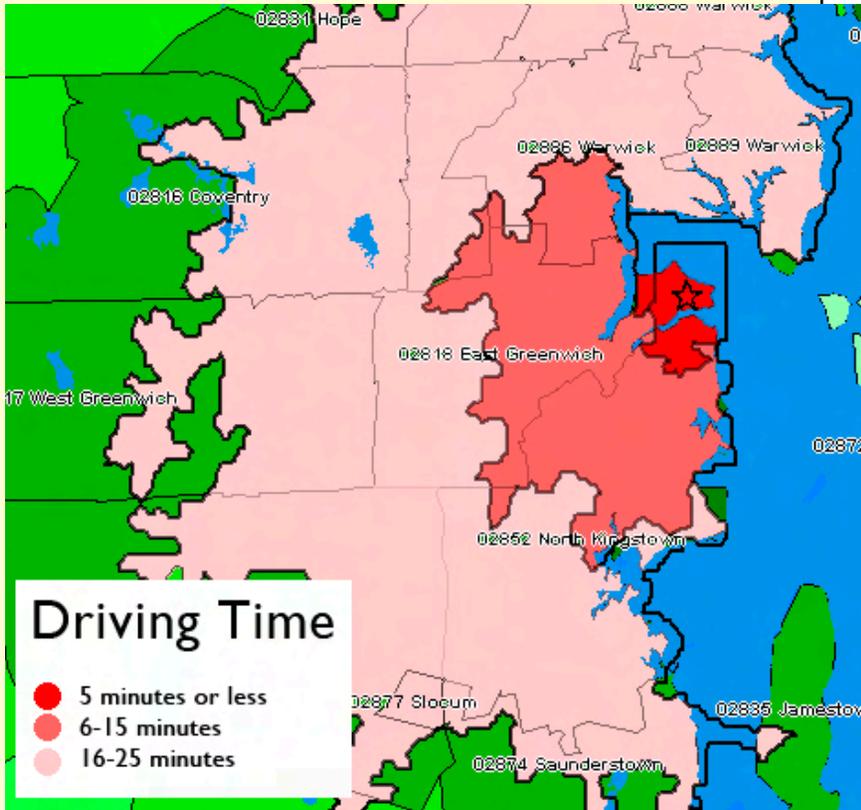
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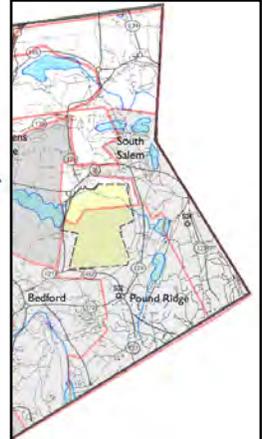
Business Plan

Market Analysis



Number of School-Age Day Care Positions Available per Zip Code

OF CHILDREN	DISTRICTS	NUMBER OF POSITIONS
651 +	Pleasantville (10570)	318
451 - 650	Cortland (10566)	298
251 - 450	Ossining (10562)	248
51 - 250	Mohegan Lake (10547)	216
0 - 50	Chappaqua (10514)	163
	Bedford (10506/07)	129
	Katonah (10536)	127
	Yorktown (10598)	122
	South Salem (10590)	70
	Mt. Kisco (10549)	64
	Croton (10520)	60
	Briarcliff (10510)	42
	Armonk (10504)	40
	Hawthorne (10532)	35



Number of Families Children 0-10 and Household Income >\$125k

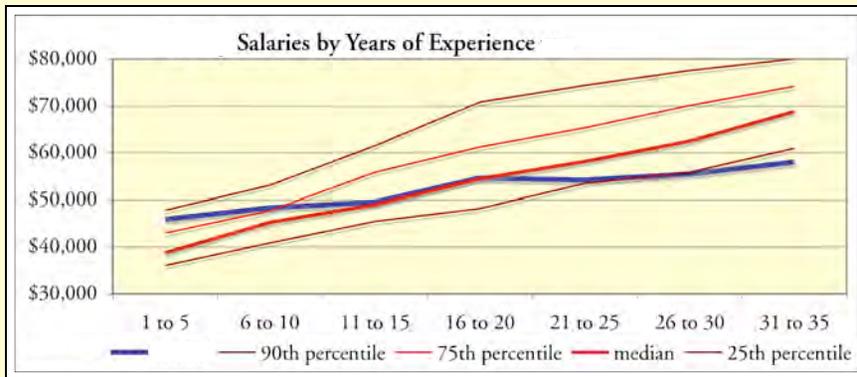
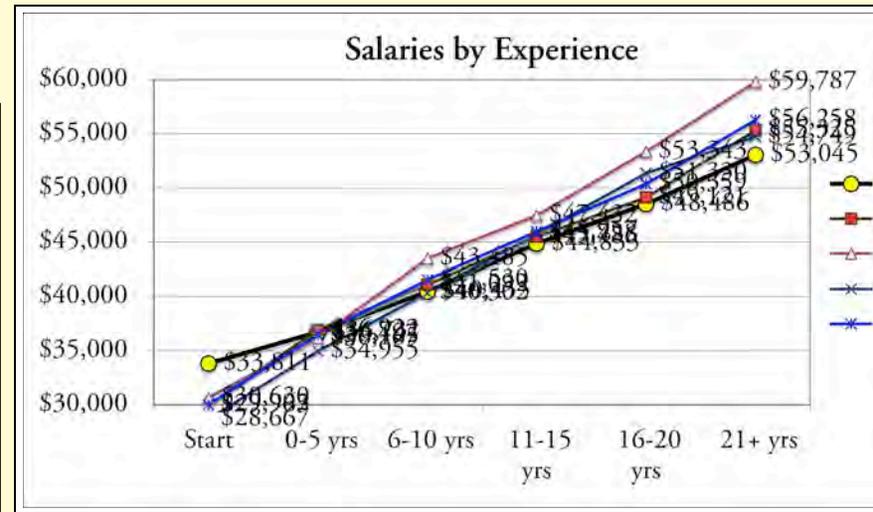
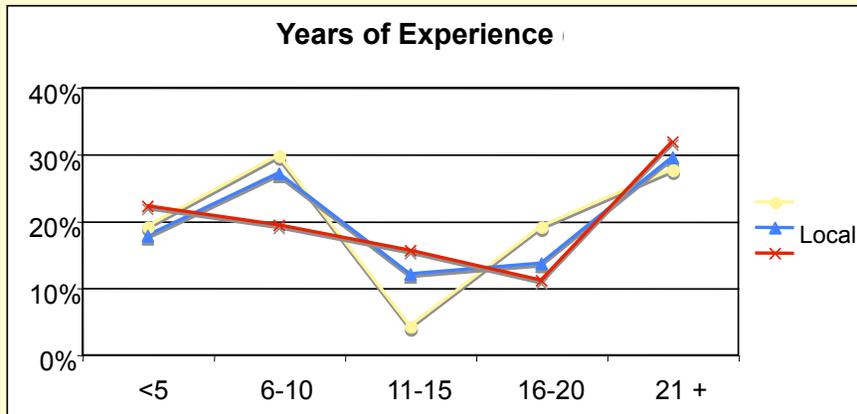
ZIP CODE	DISTRICTS	NUMBER OF FAMILIES
400 +	Yorktown (10598)	616
300-399	Chappaqua (10514)	413
	Ossining (10562)	279
	Pleasantville (10570)	271
200-299	Briarcliff (10510)	263
	Katonah (10536)	237
100-199	Mt. Kisco (10549)	221
0-99	Bedford (10506/07)	218
	Armonk (10504)	213
	Croton (10520)	183
	Mohegan Lake (10547)	178
	Hawthorne (10532)	163
	Thornwood (10594)	146
	South Salem (10590)	143
	Millwood (10546)	42
	Cortland (10566)	39
	Granite Springs (10527)	20

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Business Plan

Insights



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Organizational Development

Board Issues

Develop a cohesive, balanced board with all required expertise

Identify and recruit capable board leadership

Focus the board on its primary responsibilities

- Planning
- Finance
- Fundraising
- Oversight
- Renewal

Conduct regular self-assessments

Use available resources

- BoardSource and other websites

Staff Issues

Organizational structure

Professional development

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Organizational Development

Planning and the board

Role

Own the planning process

Set the strategic direction

Approve mission-based goals & supporting objectives

Monitor implementation

Distinguish governance from management

Benefit: Awareness of

Issues

Organization

Roles

Opportunities

Needs

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Organizational Development

Board Self Assessment Tool

Small Arts Center Board Self-Assessment [Exit this survey >>](#)

Section 1: Mission

Mission is the reference point for all actions of the organization. It is the reference point for all actions of the organization.

Small Arts Center Board Self-Assessment

Section 2: Advocacy

Essentially the board is Trinity-On-Main. There is no other organization that we are representing.

Small Arts Center Board Self-Assessment

Section 3: Fundraising

Fundraising is the responsibility of all board members. It is the responsibility of all board members.

Small Arts Center Board Self-Assessment

Section 4: Board Operations

The board is responsible for oversight of the organization's assets for future generations.

How effectively is the board using its assets for future generations?

Very dissatisfied

The board has an effective process for nominating and selecting new members.

The board provides new opportunities for the organization.

Small Arts Center Board Self-Assessment [Exit this survey >>](#)

Section 5: Planning

A habit of sound planning is the foundation for wise action.

Small Arts Center Board Self-Assessment [Exit this survey >>](#)

Section 6: Operational Oversight

The board should be aware of the distinction between governance and operations, and must take on a role in ensuring that the organization is operating effectively.

Small Arts Center Board Self-Assessment [Exit this survey >>](#)

Section 7: Fiscal Oversight

The board is responsible for the finances of the organization. However it delegates tasks to a committee or staff, the board is responsible for the overall financial health of the organization.

Small Arts Center Board Self-Assessment [Exit this survey >>](#)

Section 8: Other Considerations

We touched on many issues in the board meeting and in individual discussions. In this section please help us to focus and prioritize these issues.

What are the most critical issues facing Trinity on Main?

1.
2.
3.
4.

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Institutional Identity Development

What is identity?

Why does it matter?

Identity vs. brand

Clarifying your identity

Developing your brand

Expressing your brand

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Institutional Identity

Mission & Mission Statement

Mission Statement

Moses Brown, a Friends school, exists to inspire the inner promise of each student and instill the utmost care for learning, people, and place.

Our Philosophy a

Moses Brown is a
nourished. We str
students reach the

Our values direct
students' growth a
own sake, resourc

Moses Brown has

Friends Education
within a stimulat
arts and athletics,
integrity, commu

Leadership and C

I'm Too Young For This! Cancer Foundation

Our mission is to

end isolation and improve quality of life for young adults affected by cancer.

We do this by:

- serving as a support and
- educating p
- advocating

movement and drive change.

- gaining a better understanding of the needs of young adult survivors.
- using music and the arts to connect and unite young adults, build community and make it hip to openly about their experiences.

The mission of **Invent Now** (the National Inventors Hall of Fame) is to **celebrate and foster the spirit and practice of invention — the innate human impulse that drives social and economic progress.**

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Advancement Planning

Ongoing work

Communications

External relations

Donor relations

Alumni relations

Annual Giving

Periodic planning

Capability assessment

Fundraising assessment

Campaign planning

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Human Resource Planning

Establish fair, predictable, & comprehensive policies

Develop an organizational chart with job descriptions

Establish hiring and evaluation procedures

Establish a clear compensation and benefit plan

Clarify procedures and responsibilities

Devote resources appropriately to needs and values

Attract, support & retain the best possible faculty and staff

Provide professional development opportunities

Provide sufficient staffing levels

Monitor performance

Reward performance

Comply with all regulations and requirements

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Technology Planning

Information technology

Hardware (administrative / program / networking / voice / smartphone)

Software (administrative / program / web)

Program technology

Group technology (fixed / synchronous)

Dispersed technology (individual / asynchronous)

Web technology (broadcast / interactive)

Knowledge management

Administrative records

Advancement records

Program content

Upkeep

Support

Content maintenance

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Facility Planning

Building Understanding: Facility Issues for Nonprofits

Topics:

- Master Planning
- Facility Planning
- Architectural Programming
- Budgeting
- Selection of Architects & Construction Companies
- Contracts
- Design & Construction
- Financial Modeling

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Control over costs



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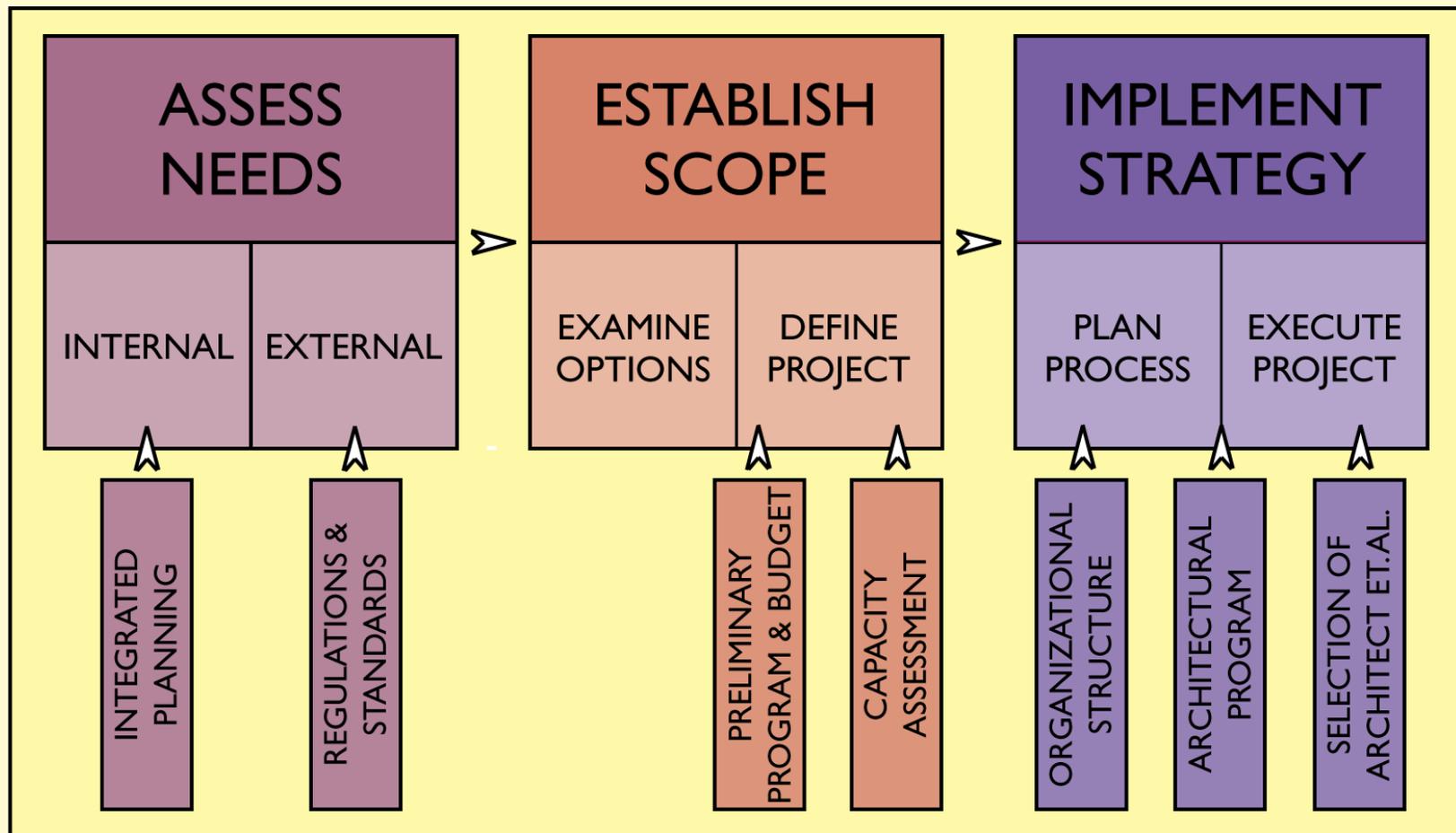
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Facility Planning Fundamentals

Process Overview



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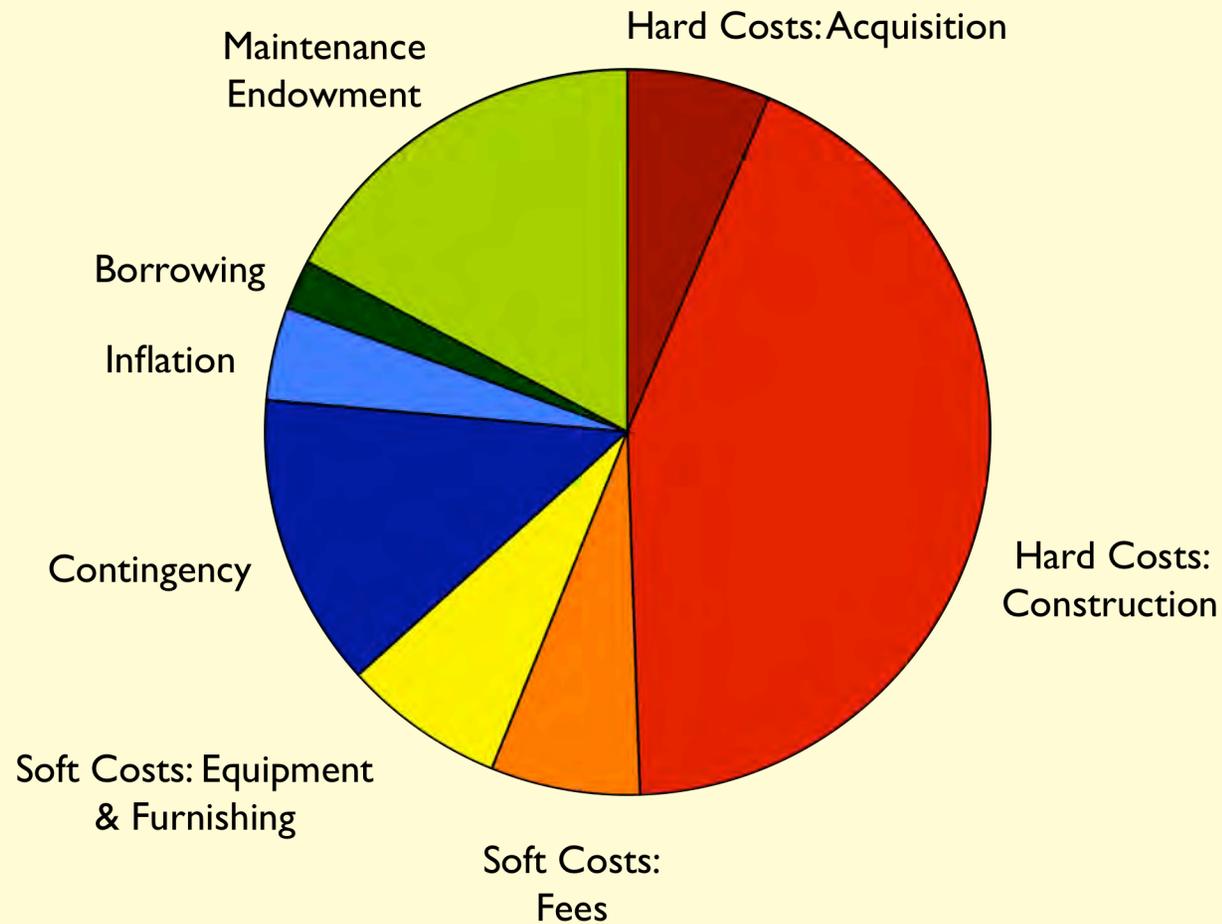
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Programming and Budgeting

Project Budget



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Financial Modeling

Purposes

View the big picture

Test options & strategies

Evaluate the impact of decisions

Reduce uncertainty & risk

Maintain control over operating & capital budgets

Areas of Interest

Operating budget

Capital budgets or new programs

Debt capacity and financing

Cash flow

Relationships among the above

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Financial Modeling Components

Typical Model Variables

Capital Costs

Acquisition costs

Furnishing, Fixtures & Equipment

Legal costs

Design costs

Construction costs

Contingency

Borrowing

Inflation

Endowment Needs

General endowment

Program-specific fund

Maintenance fund

Campaign Costs and Revenues

Administrative costs of campaign

Projected campaign revenues

Operating Costs and Revenues

Existing operating budget inflation

Program cost increases

Staffing increases

Marketing and development costs

Overhead cost increases

Cost reductions from new efficiencies

New operating revenues

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*Working with organizations facing or creating change
to align strategy, identity, business planning, and facilities
with vision, mission and values*

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Critical Issues in Strategy, Planning, & Organizational Development

a free e-letter of ideas and tools for nonprofits

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Newton MA 02459

617 969 1881

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Wednesday Webinars

3/24/2010

Using the Leadership Transition Process to Improve Your Organization

3/31/2010

Linking Income to Outcomes

3/31/2010 (2:30 EDT / 11:30 PDT)

What is a brand (and why does it matter to nonprofit organizations)?

4/7/2010

Searching for Diversity

4/14/2010

Ten Steps to Creating a Fundraising Plan

4/21/2010

Using Social Media to Listen, Attract Fans and Convert Critics

4/28/2010

Integrating Social Media Into Essential Organizational Functions

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