

**PMA** Patton McDowell  
& Associates, LLC

**Fund Development Counsel  
& Organizational Strategy  
to elevate your cause.**

# Aligning Your Personal & Organizational Strategic Plans

**Patton McDowell**  
**North Carolina Philanthropy Conference**  
**August 11, 2011**

## Why Are You Here?

- Want to focus on strategic responsibilities
- Want to advance in your organization
- Want to position yourself for your next organization

## Goals

- Find a clear path
- Enhance strategic planning skills
- Advance at this organization and the next

## Objectives

- Apply strategic planning skills
- Identify ways you can impact
- Improve professional competencies
- Frame a plan for the next 90 days

## Assumptions

- Be proactive
- Manage planning fears
- Look at different horizons
- Understand limitations



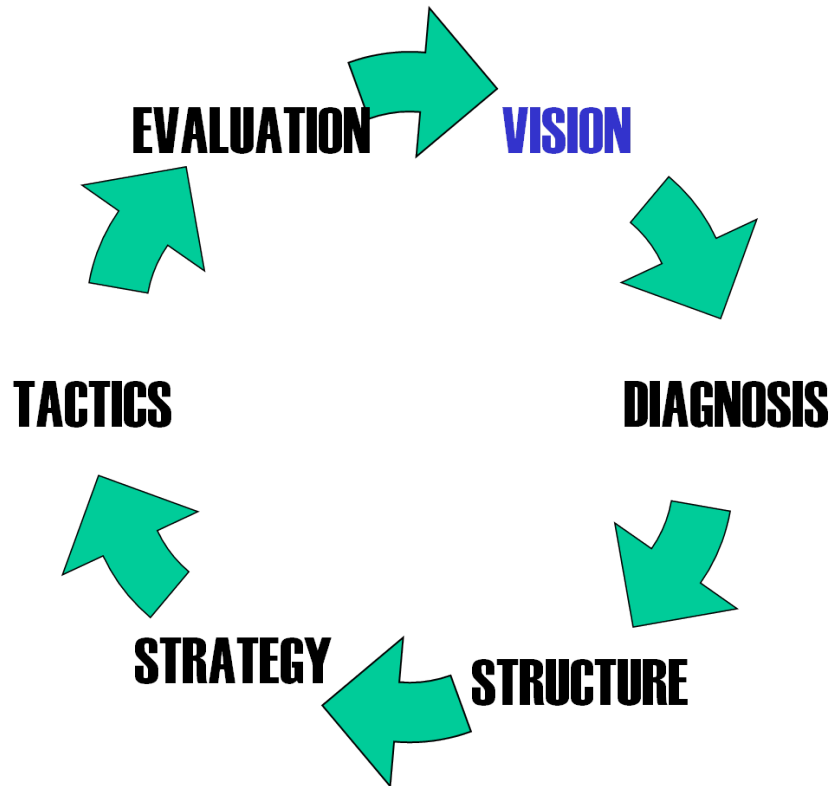
## Make Strategic Planning Your Advantage

- Your organization needs your contributions
- Your organization needs you to get better
- Your donors/volunteers want to talk strategy
- Your professional advancement will benefit

## Presentation Framework

- Parallel discussion of organizational and individual success
- Provide ideas and resources in each category
- Suggest multiple horizons of planning, from 90-days to “future state”

# Strategic Planning



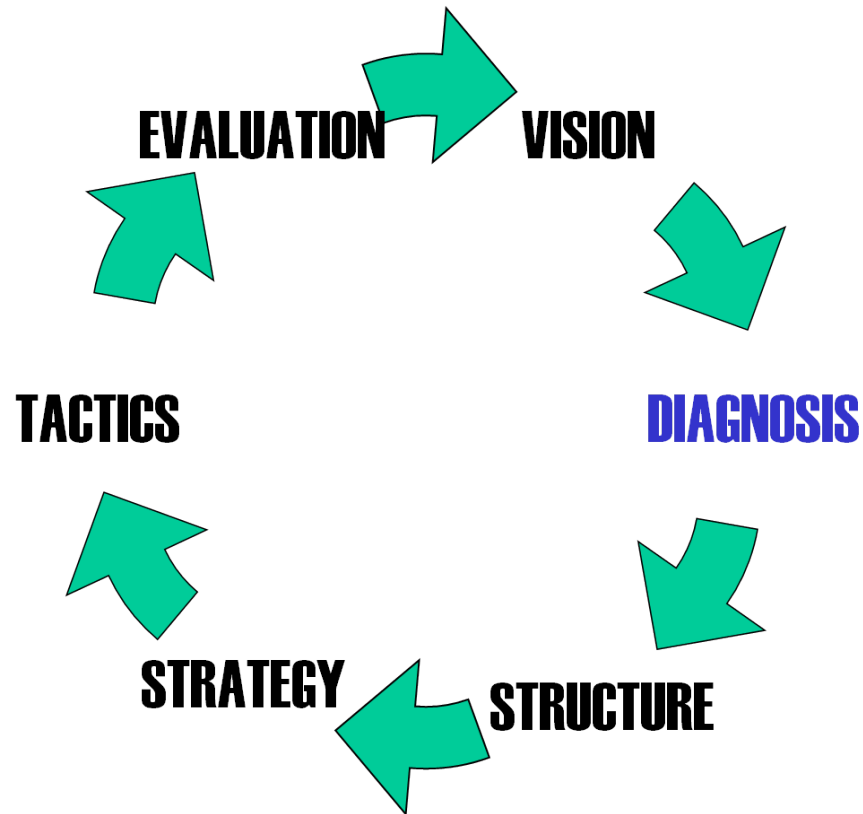
## Sharpen Your Vision

- Are your mission and vision statements clear and concise to external funders?
- Does your vision statement succinctly articulate the end goal your organization is trying to achieve?
- What will you accomplish this year that moves you closer to your stated vision?

## Sharpen Your Vision: Action Items

- Organization: Mission, vision, next year
- Individual: Written vision statement
  - 10-year horizon
  - Professional
  - Personal
  - Educational
  - Financial

# Strategic Planning



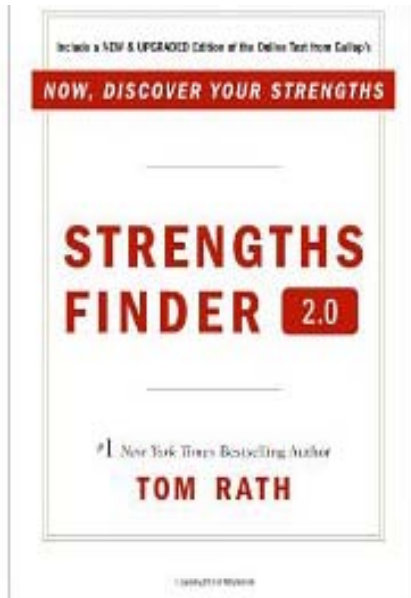
# SWOT Analysis

Internal	External
<b>STRENGTHS</b>	<b>OPPORTUNITIES</b>
<b>WEAKNESSES</b>	<b>THREATS</b>

## SWOT Analysis: Action Items

- Organization: Apply SWOT analysis to development cycle, stakeholders, comparative organizations
- Individual: Apply same analysis
  - Utilize 10 key competencies

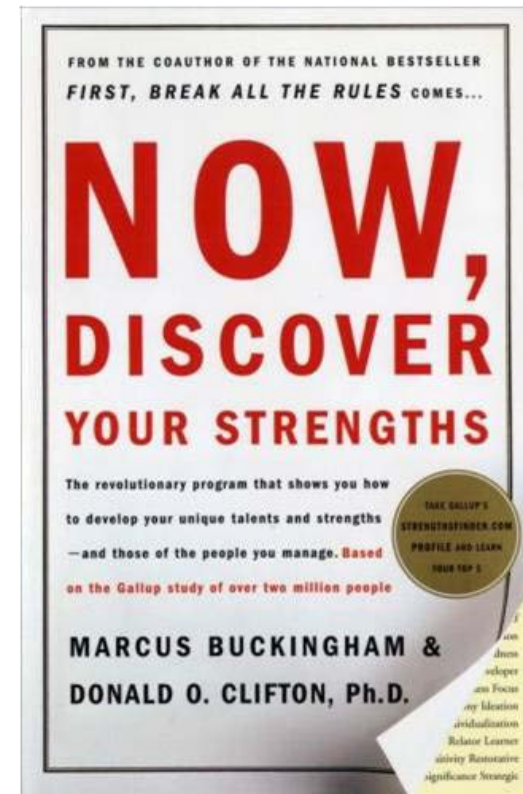
# Key Competencies



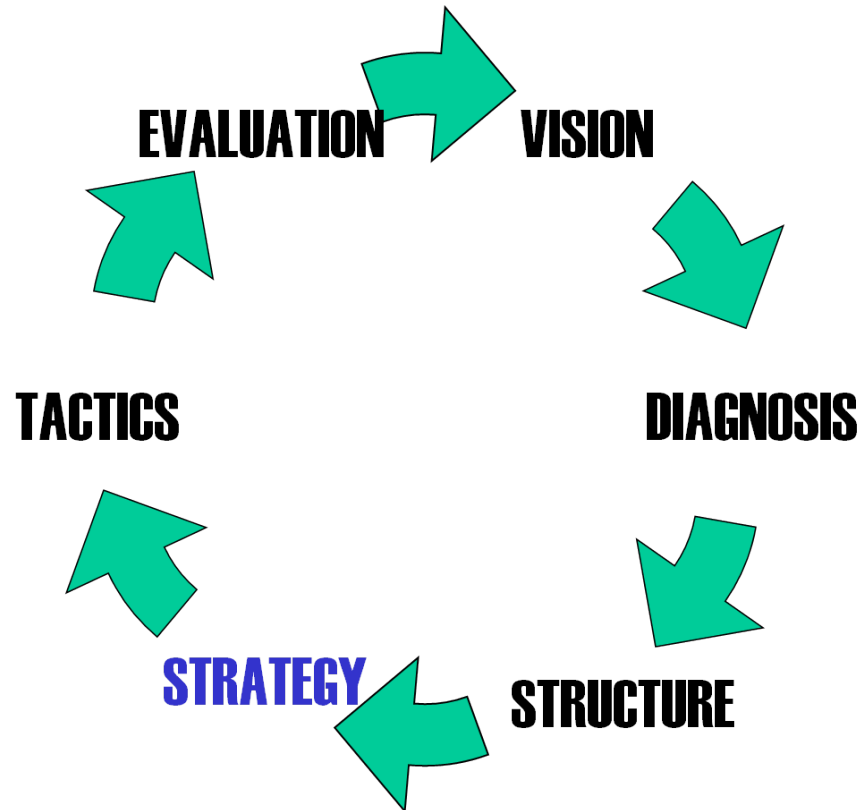
1. Learning Plan
2. Personal Organization
3. Leadership
4. Networking
5. Speaking

## Key Competencies

6. Writing
7. Listening/Conversation
8. Financial Acumen
9. Sector
10. Nonprofit



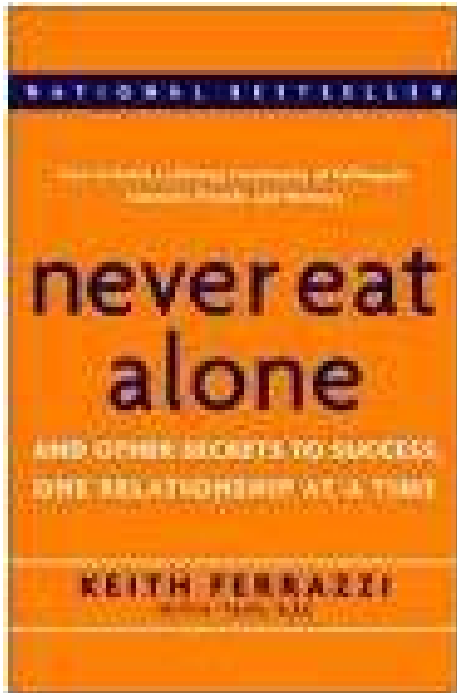
# Strategic Planning



## Engage Your Board

- What is the ideal board structure for your organization?
- How are you cultivating and recruiting new potential board members?
  
- Three Tools:
  1. Current Demographic Chart
  2. Ongoing Prospect List
  3. Orientation Plan

## How About Your Board?

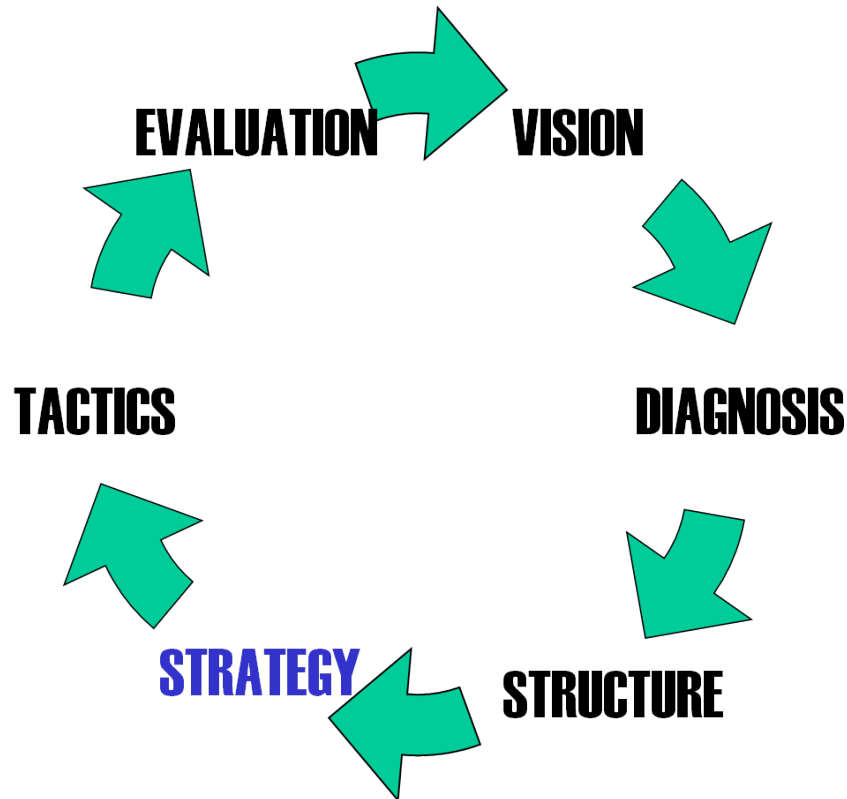


- You are the Company
- What skills do you need?
- Informal
- Structure

## Board Development Strategy

- Professional services
- Peer connections
- Content expertise

# Strategic Planning

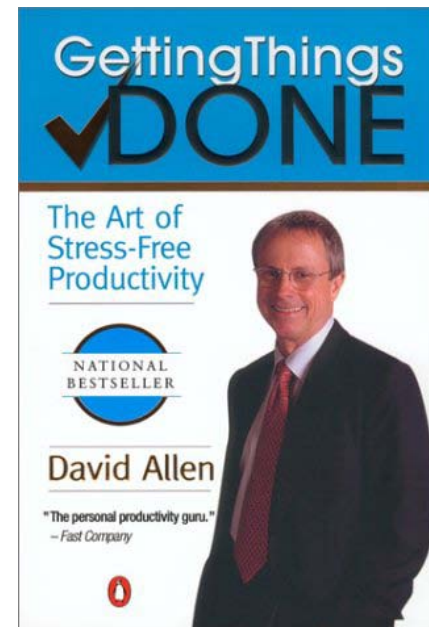


## Value of Comparisons

- Who are your key constituencies? Who else serves them?
- Two questions you should answer:
  1. Three organizations most similar to yours in your market
  2. Three organizations in your sector that are considered best practice
- Who are best individuals in your field?
- Who has most similar situation?

## Activate Your Plan

- Expand your planning horizons
- Commit to vision statement
- Initiate a 90-day plan
- Schedule “key meetings”



# Final Thoughts