

**Greater Washington Society of CPA's  
2022 Nonprofit Symposium**

# PERSPECTIVE

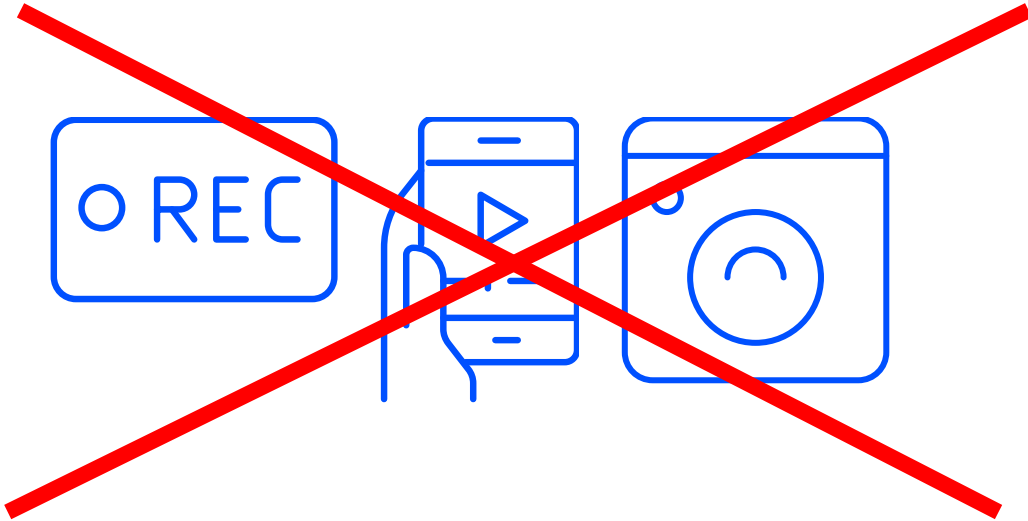
A man in a suit is looking out from a high-rise building, with the word 'PERSPECTIVE' overlaid in large white letters. The background is a blue sky with white clouds.

**CHANGES EVERYTHING.**

**Strategy: From Planning to Action in a Post Pandemic World**

**WIPFLI**

# No recording of any kind



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## Overview

Learning objectives **01**

From strategy to action **02**

Action planning for impact **03**

Putting it all together **04**

Establishing priorities and putting  
it all together **05**

Next Steps

# Introductions



## Jeffrey Prottas

*Manager*

- Jeffrey brings nearly 30 years of experience working with nonprofit and government organizations positioning them for financial, operational, and programmatic growth. Jeffrey has significant experience facilitating change to support strategic growth objectives through innovative strategies.
- Jeffrey has worked with dozens of nonprofits leading strategic planning projects, assessing organizational effectiveness, and building resource development initiatives.



## **Learning objectives**

**Identify how to build actionable work plans, accountability, and clarity into strategic planning**

**Build action plans that drive change in your organization**

**Motivate and empower staff, Board, partners, and funders to support your strategic objectives**

Where do you want to go?

**One of the single greatest barriers to strategic planning success is failure to properly implement action plans.**

**What you will take away:**

- Ability to create and design strategic action plans
- Use a standardized approach to executing action plans
- Breakdown large strategic objectives into manageable action plans with measurable and achievable results



What's holding you back?

**If the task is too big, the challenge too complicated, or the path too difficult . . .**

## **Understanding action planning barriers**

We have a plan, but where do we go from here?

## **Action expresses priorities**

Your decisions reveal your priorities

## **You always have time for things you put first**

Vision and Strategy without Execution is Hallucination



# **From strategy to action**

**Vision**

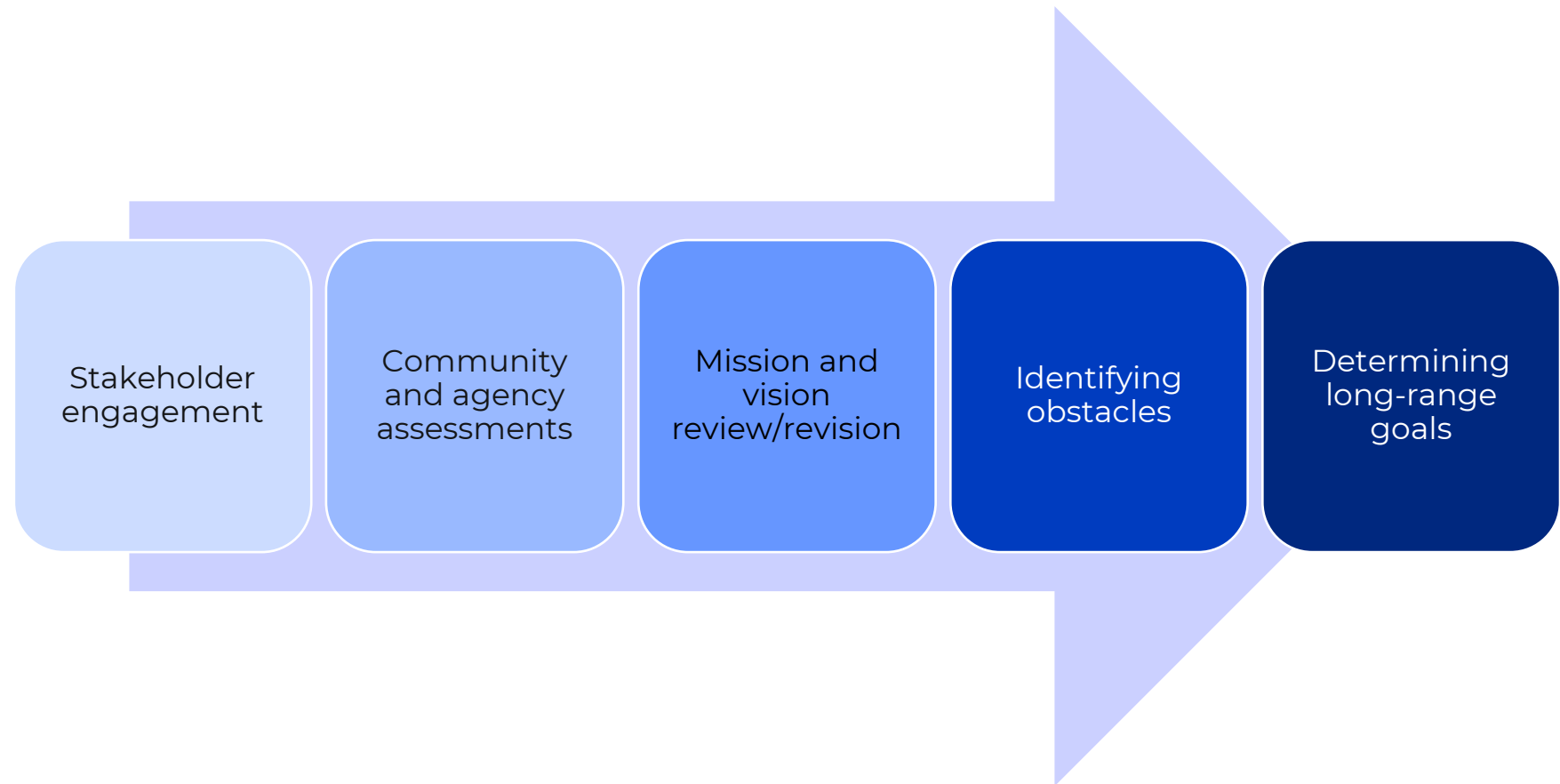
**Act**

**Thrive**

**“A time to repair  
the roof is when  
the sun is  
shining”**

**-John F. Kennedy**

## **Traditional strategic planning**



## Action planning: where the rubber meets the road

Strategic priorities and objectives

Critical success indicators

Actionable goal statements

Strategic initiatives

Action items

Champions

**“No one is born a great cook; one learns by doing.”**

**-Julia Child**

**Strategic priorities and objectives**

Areas that lead to achievement of your vision.

**Success indicators**

Metric and non-metric measurements demonstrating success.

**Goal statements**

Statement of action giving purpose to your planning.

**Initiatives**

Long-term, broad strategies that lead to successful achievement of objectives.

**Action items**

Items that we must do.

**Champions**

Someone to take the lead.

**“Change is hard.  
Resisting  
change, a lot  
harder.”**

- Eleanor Brown

## **What is change?**

Process, tools, and techniques to manage the people-side of change to achieve the required organizational outcome.

## **How are change and strategic planning connected?**

When you have one . . . you have the other!

## **Current reality versus the future...**

How changes today impact the reality of the future on an individual, organizational, and communal level

# What is change

“Organizations don’t change - people within organizations change.”

01

Manage  
passive &  
active  
resistance

02

Increase  
probability of  
success

03

Reduce  
transition  
time

04

Retain  
valued  
employees

05

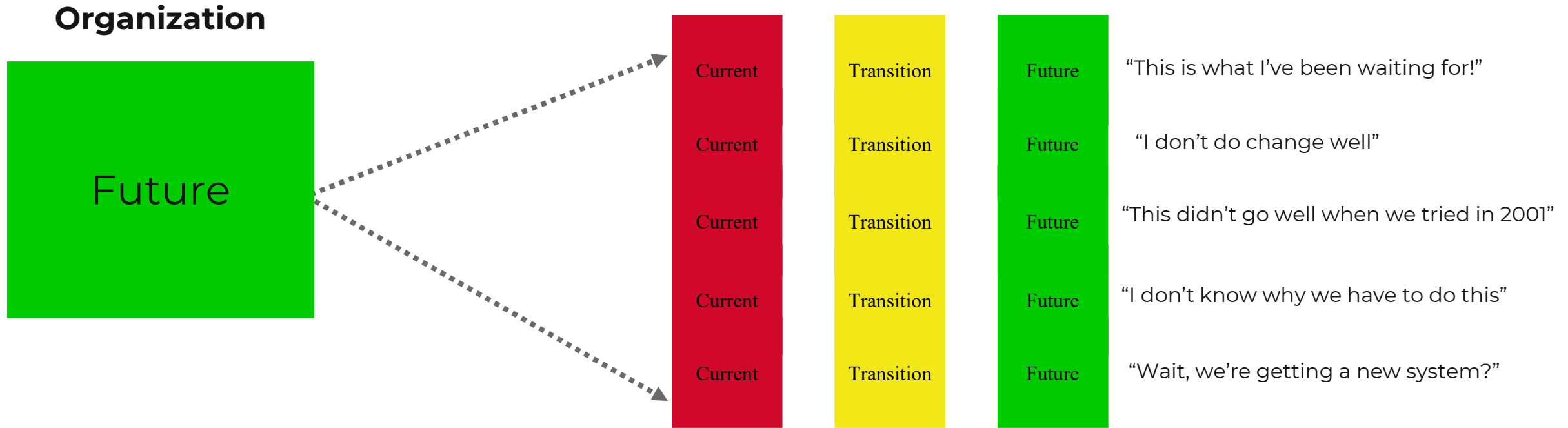
Eliminate  
desire to  
revert/ find  
workarounds

06

Maintain  
trust

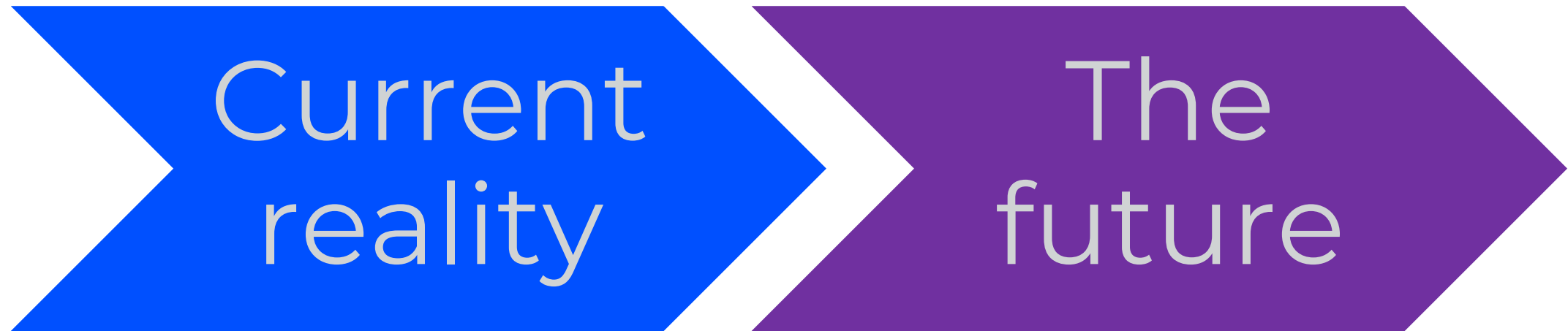


# One-to-many relationship



The organization's future state is actually the collection of many individual future states.

# NOW situation assessment





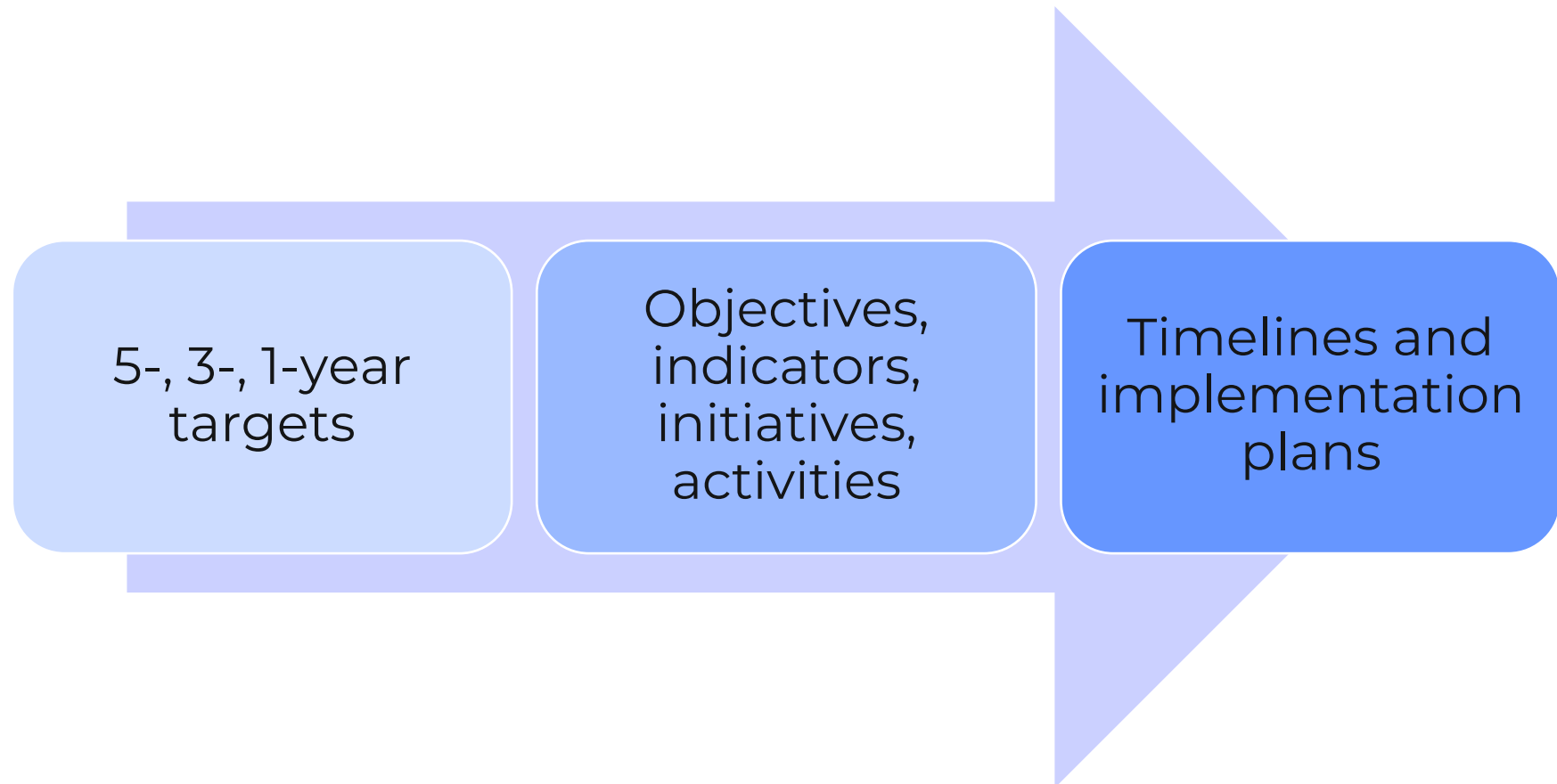
**Action planning for impact**

**“A dream  
written down  
with a date  
becomes a  
GOAL.**

**A goal broken  
down into steps  
becomes a  
PLAN.**

**A plan backed by  
ACTION makes  
your dreams  
come true.”**

## **Strategic planning in action**



What outcomes do we want to achieve?



Begin with the current reality

What do we want to see in place in 3-5 years as a result of our actions?

Identify 1 to 3 year accomplishments



How will we measure success?



What will be different in 2-3 years?

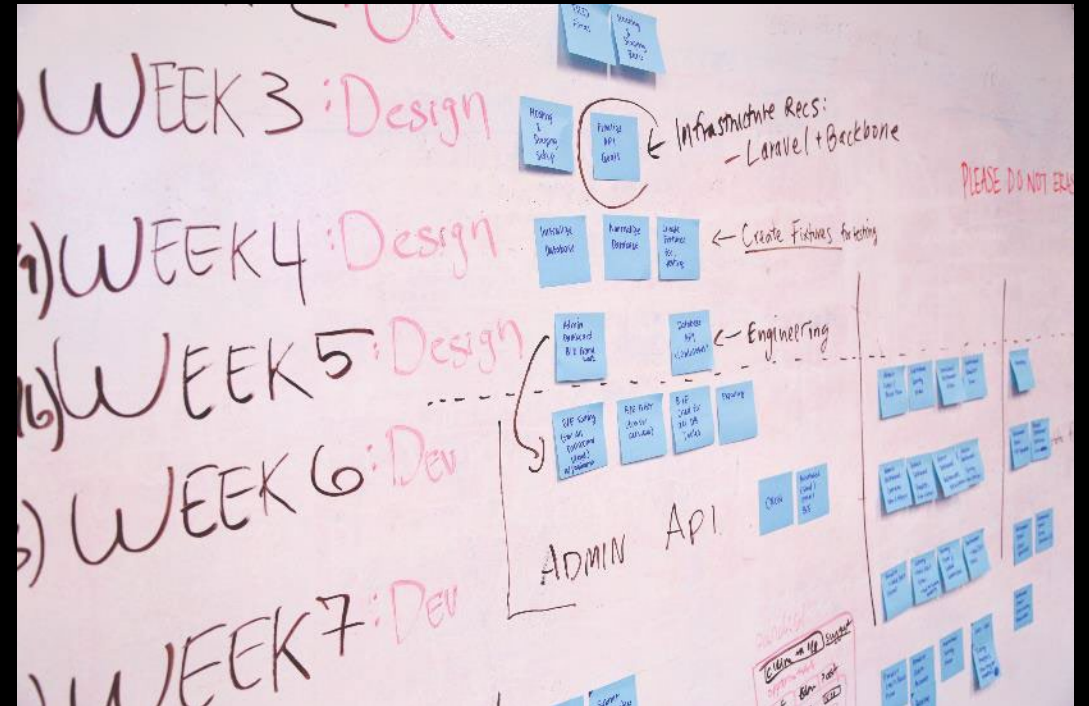
Is it specific and measurable?

Is it realistic and can it be done in our timeframe?





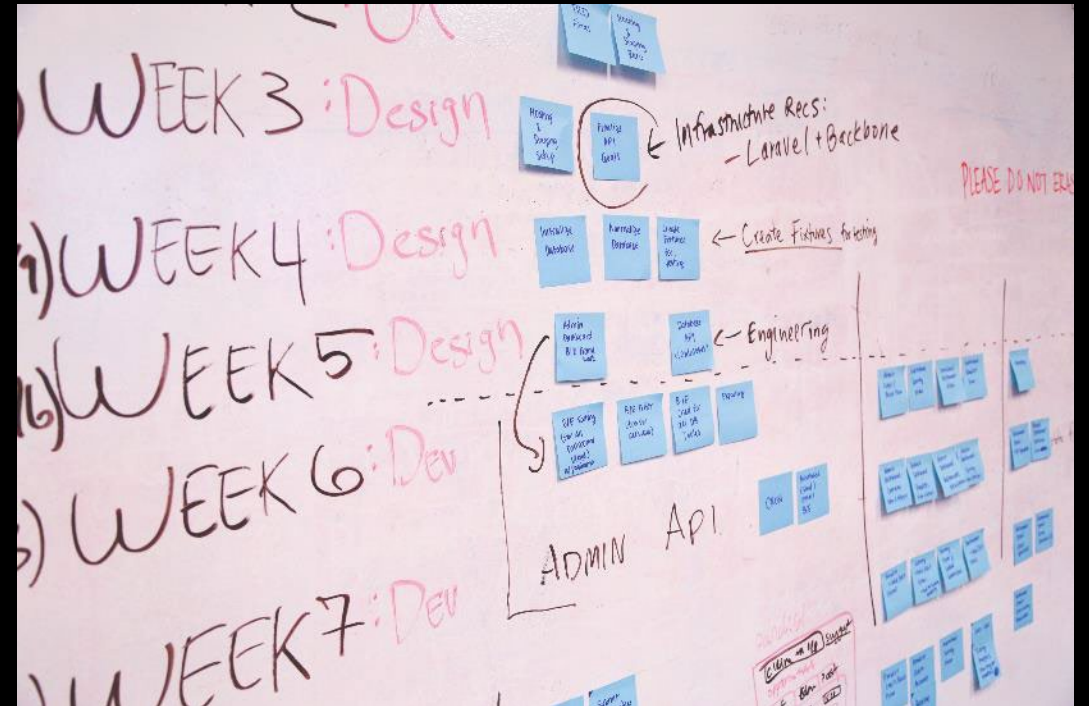
What are our most critical “Must Do’s”?

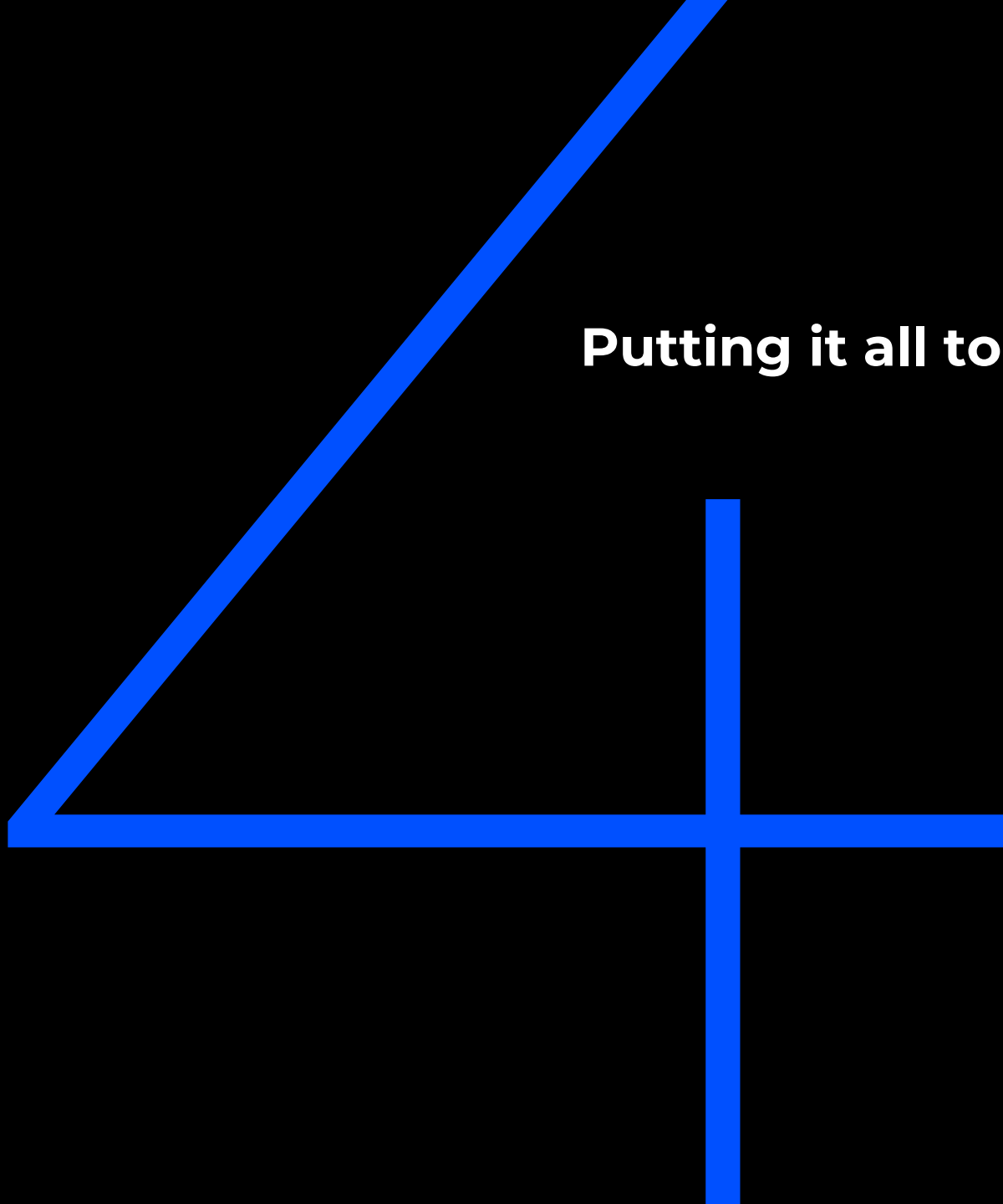
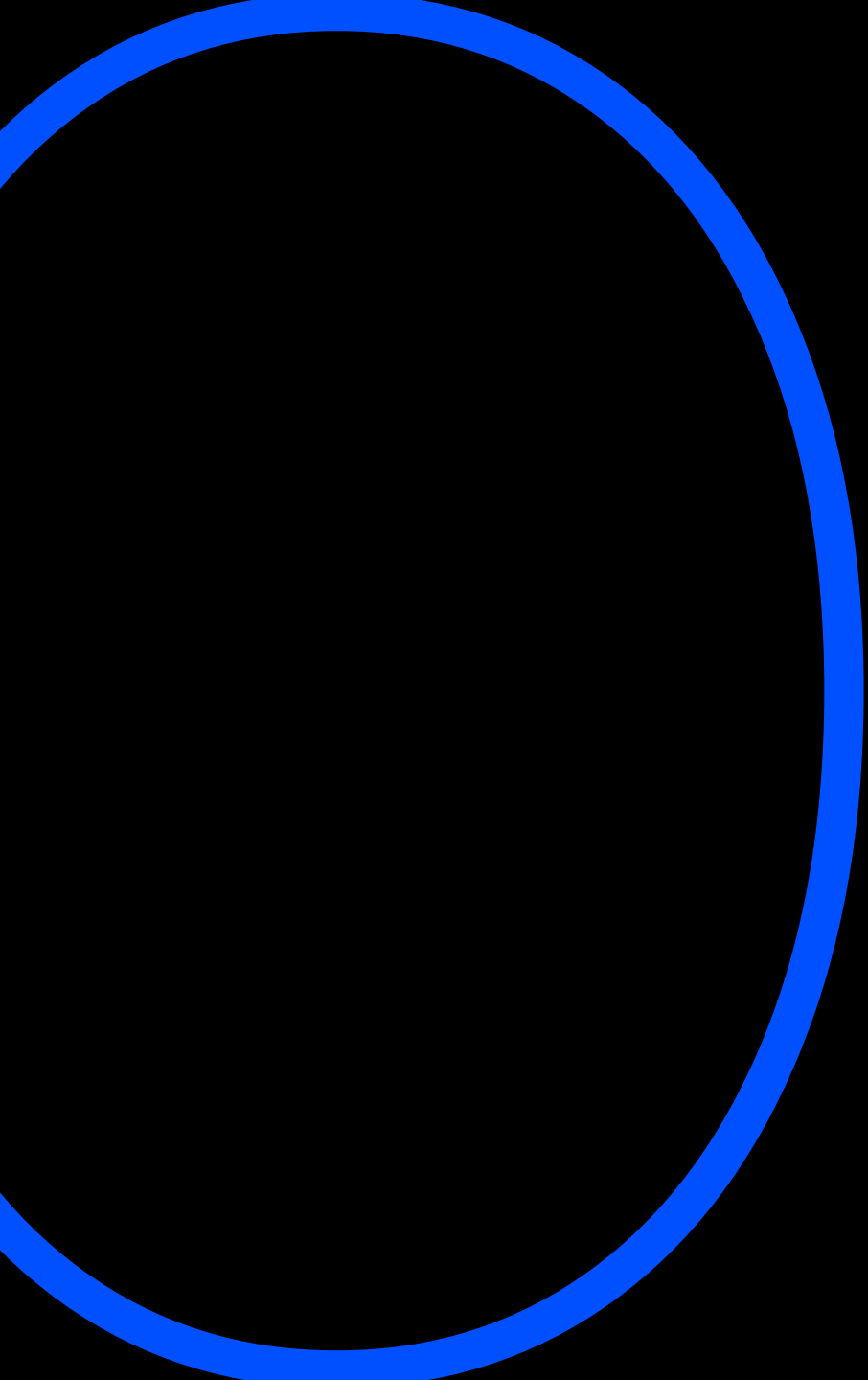


What do we “have to do”?

Who can do it?

When must it be done?





**Putting it all together**

**Just because you  
took longer than  
others, doesn't  
mean you failed.**

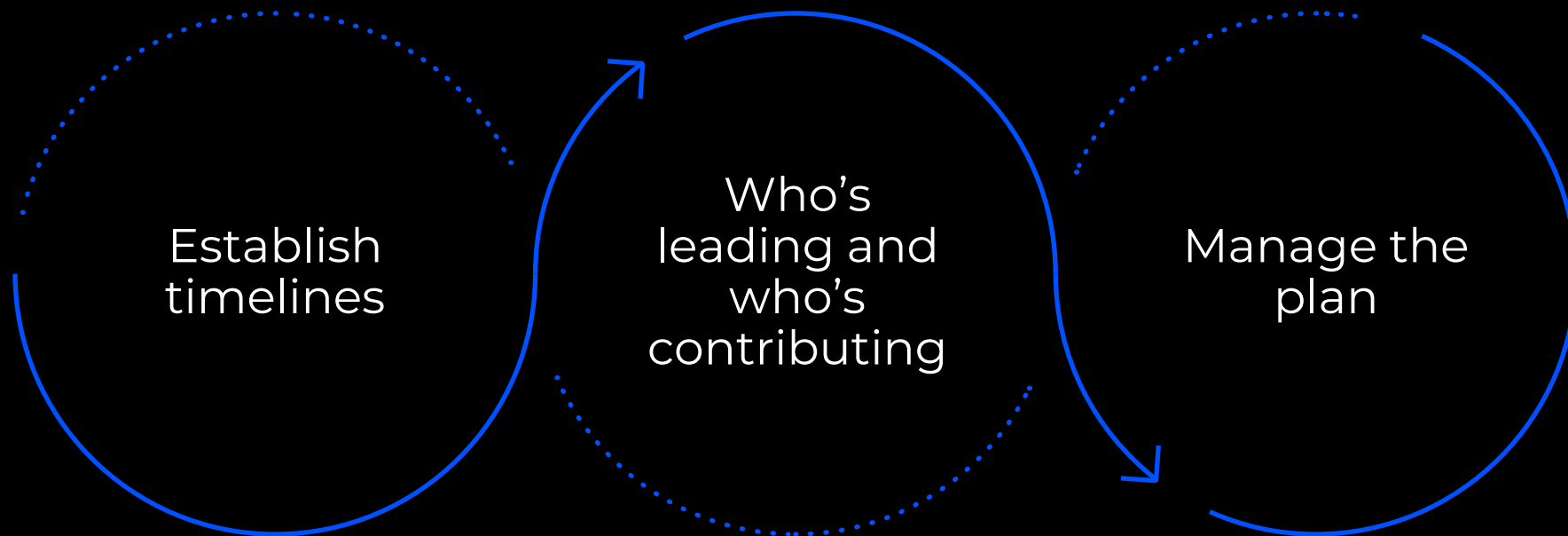
**Remember that!**

- Daniel Danzor

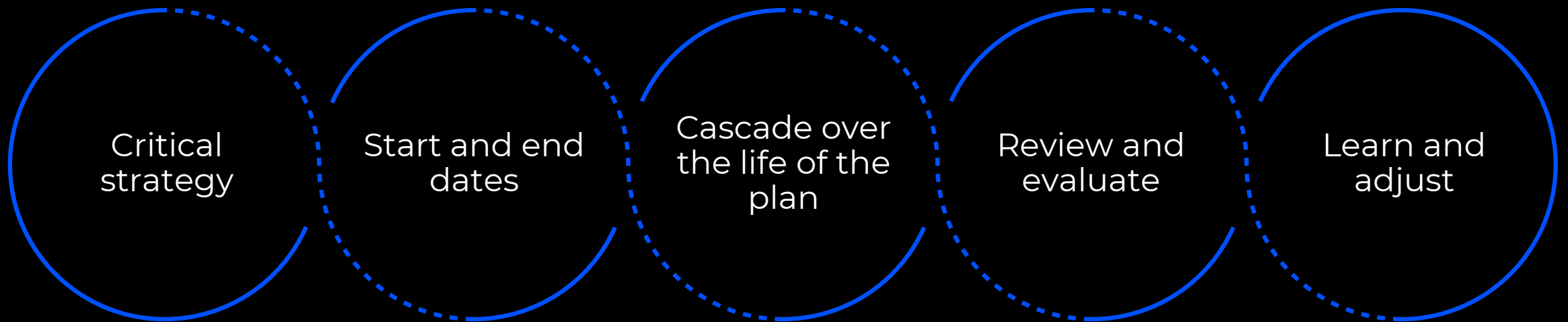
## **Timelines, accountability, and performance management**

- Give your organization time to implement is critical
- Delegate the work to a larger implementation team will elevate the quality of the work
- Create consensus on coordinating the management of the plan
- Make sure everyone is comfortable with their assignments

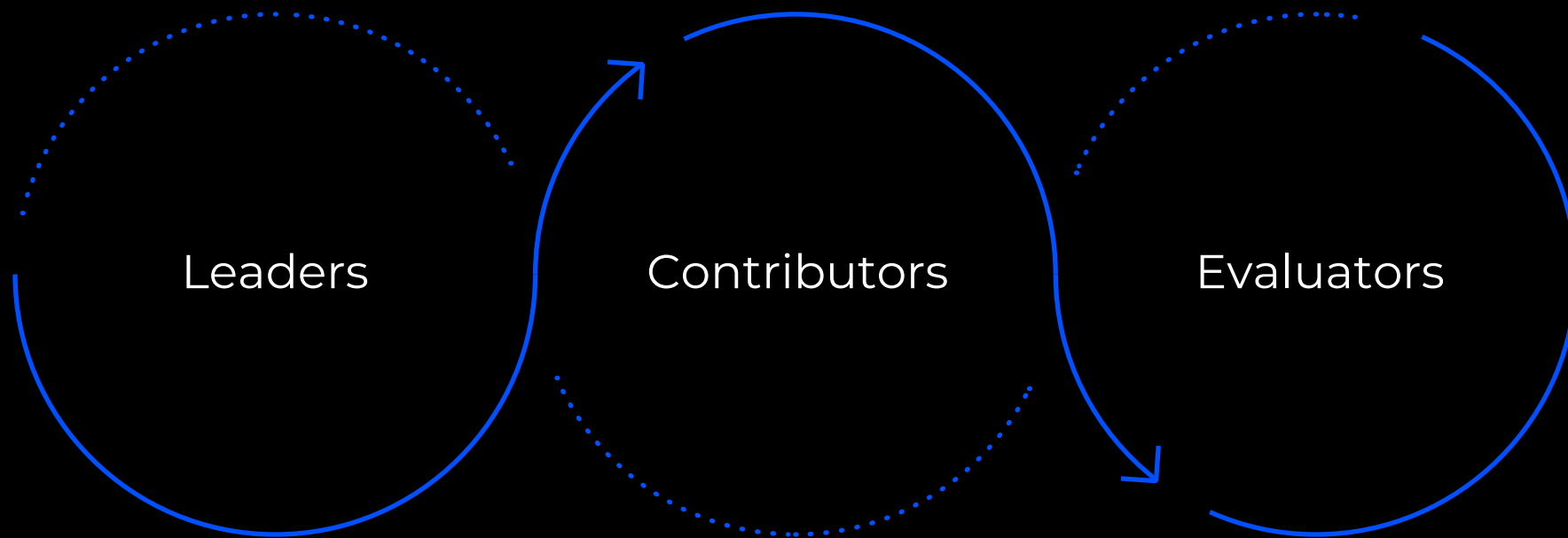
## It's a Marathon not a Sprint



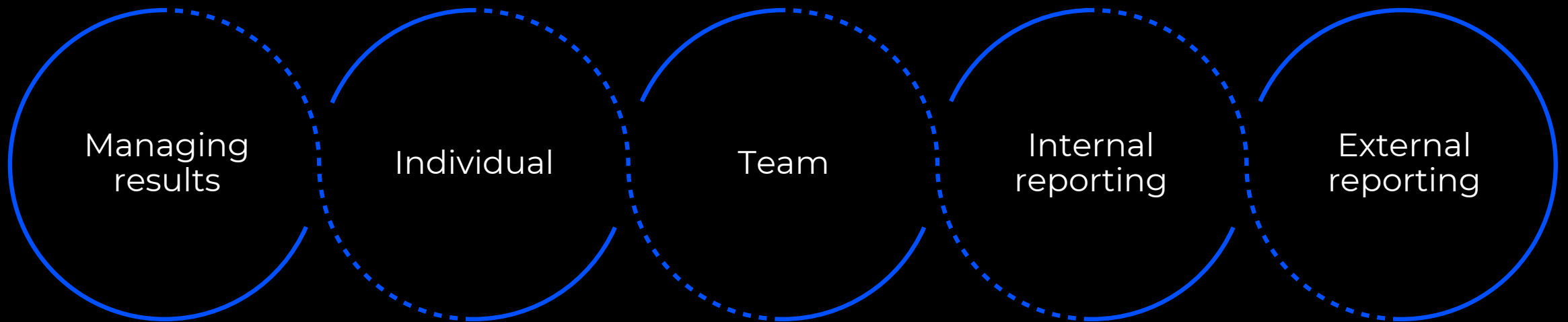
## Establishing a timeline of success



## Managing the plan: who's who?



## Performance management: ensuring long term success







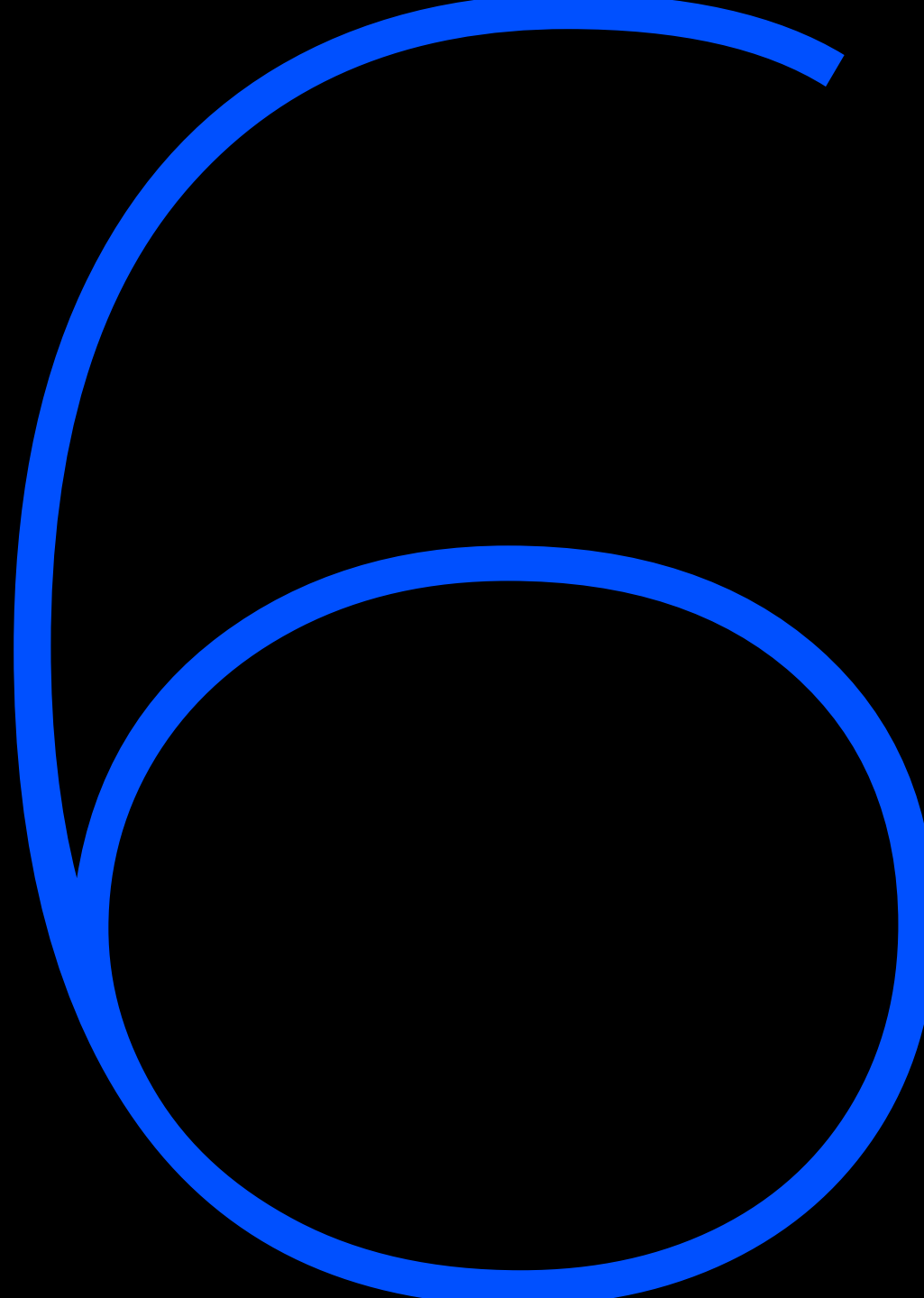
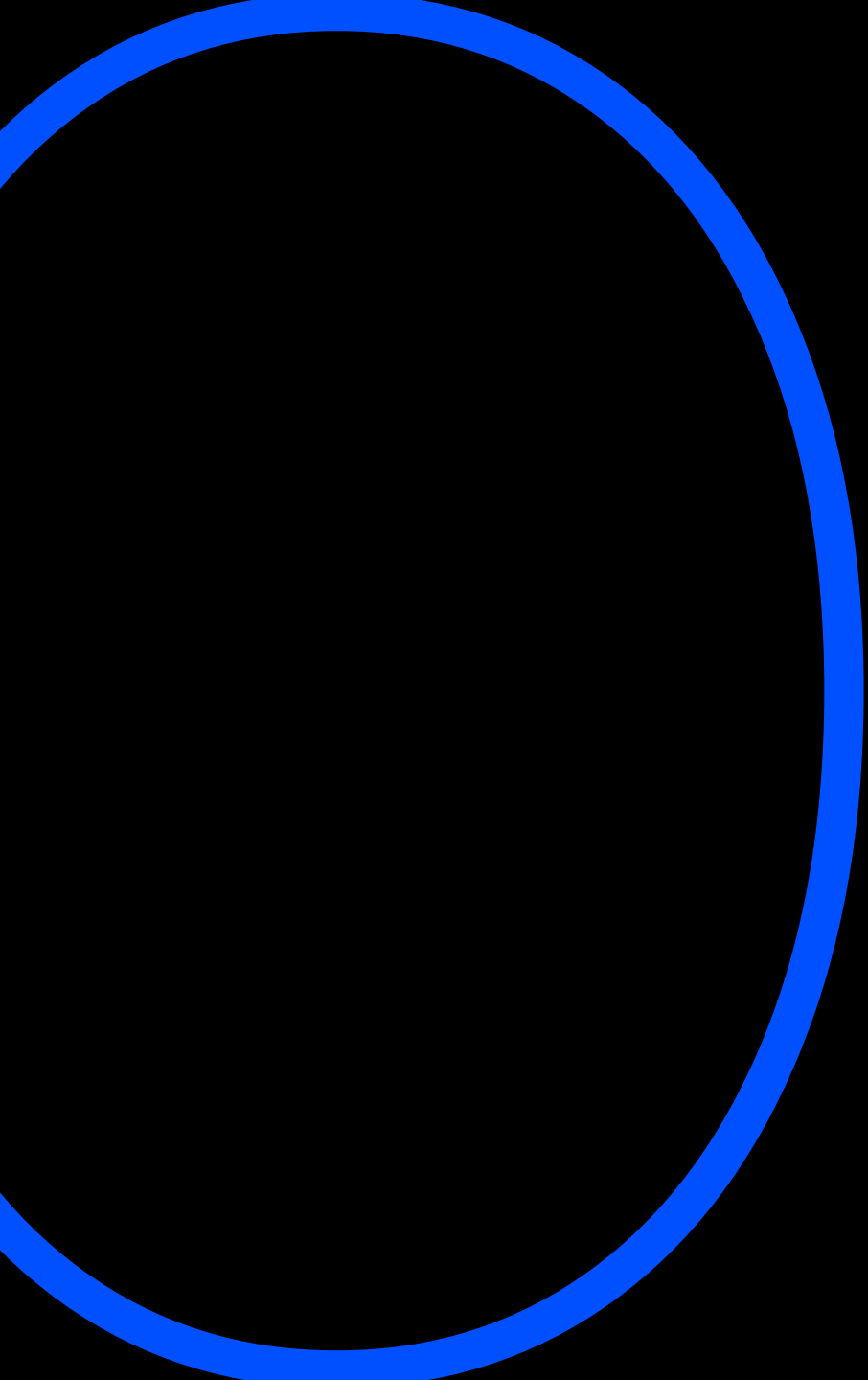
**Establishing priorities  
and  
getting started**

**“Action  
expresses  
priorities . . .”**

- Mahatma Gandhi

**We finished the plan, now what . . .**

- Make the commitment (it's not as easy as you think)
- Install the plan as part of the culture of the organization
- Establish priorities for the first 90-days, then the next 90-days, then the next 90-days
- You've planned the work, now work the plan



**Next steps**

Greater *understanding.*  
*engagement.*  
*impact.*  
*delivery.*  
*measurement.*  
*growth.*

Questions?

**If you have any questions, please feel free to be in touch.**

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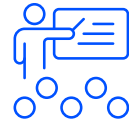
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## How did we do?

Please take a  
moment to fill out  
your evaluation.



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**ONE TEAM,**  
**ONE FOCUS.** **YOU.**