



Strategic Planning Empowers NPO Case Study

Highlighted Results

Strategic goals identified through comprehensive planning process

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*Critical issues and choices clearly understood by leadership*

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Relevant, flexible, achievable road map developed

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*Commitment and enthusiasm for strategic plan among stakeholders*

### Featured Project

In existence for over 100 years, a \$7million urban center serving the homeless and poor of Milwaukee, and supported entirely by private donations, plans for the future.

### The Challenge

The organization had a small, long standing Board of Directors. With the fresh perspectives provided by a new Chairman and Executive Director, the organization sought to set priorities in a clear direction for the future.

### The Legacy Group Execution

The organization engaged The Legacy Group to design and guide a comprehensive strategic planning process that would involve a broad group of stakeholders, including board, staff and community representatives. The approach included:

- Information gathering and assessment
- Review of assessments and identification of critical issues and choices over the next 5 years
- Development of briefing papers for each of the critical issues
- Development of a vision statement, goals and strategies during a board/staff planning retreat
- Development of objectives for each goal by members of the staff and strategic planning committee

### The Legacy Group Impact

- The Legacy Group guided board and staff leadership through an effective strategic planning process resulting in a highly relevant, flexible and achievable road map for the next five years.
- Five strategic goals that addressed identified critical issues were developed:
  - ◇ Enhancing awareness and visibility
  - ◇ Increasing the mission impact of programs
  - ◇ Strengthening financial support
  - ◇ Planning for future leadership growth, and
  - ◇ Assuring adequate facilities to meet current and future needs
- Implementation plans for each goal detailed high leverage strategies and action objectives including identification of responsible parties, time frames and measurement tools for each.
- Leadership developed a thorough understanding of the critical issues and choices facing the organization.
- Board and staff leadership exhibited a high level of enthusiasm and commitment for the resulting strategic plan.

Client reference available upon request