



Business Planning for Nonprofits: Why & How

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Today's Speaker

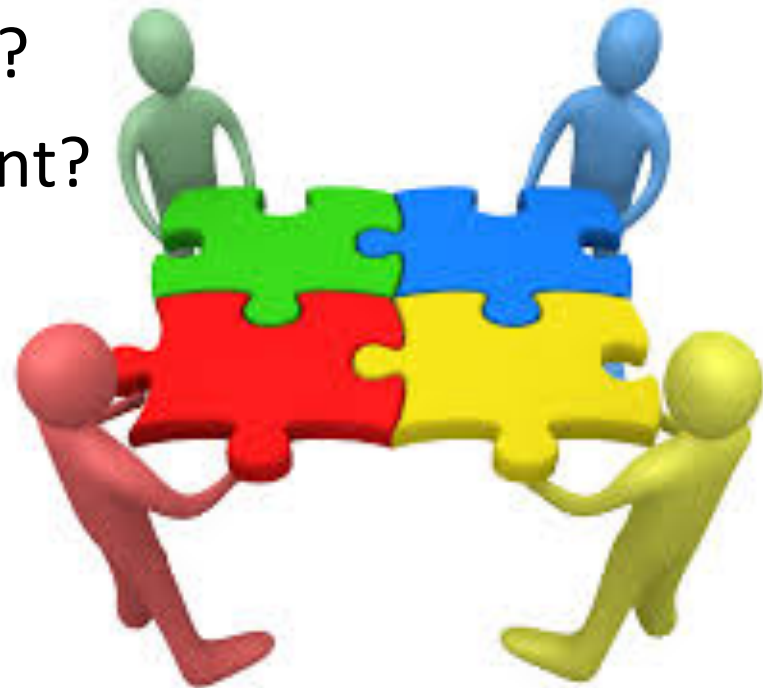


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- 8 Years with Resource Associates
- Bachelor of Science Degree in Journalism from California Polytechnic State University San Luis Obispo
- Reviews over 200 applications a year
- Federal Reviewer
- Contributor to some of the highest scoring federal proposals in the Country
- Background in Technical Writing and Journalism

Business Planning for Nonprofits

- Business Planning vs. Nonprofit Planning
 - Why is it important?
 - Are they the same thing?
 - Why is strategy important?



Business Planning for Nonprofits

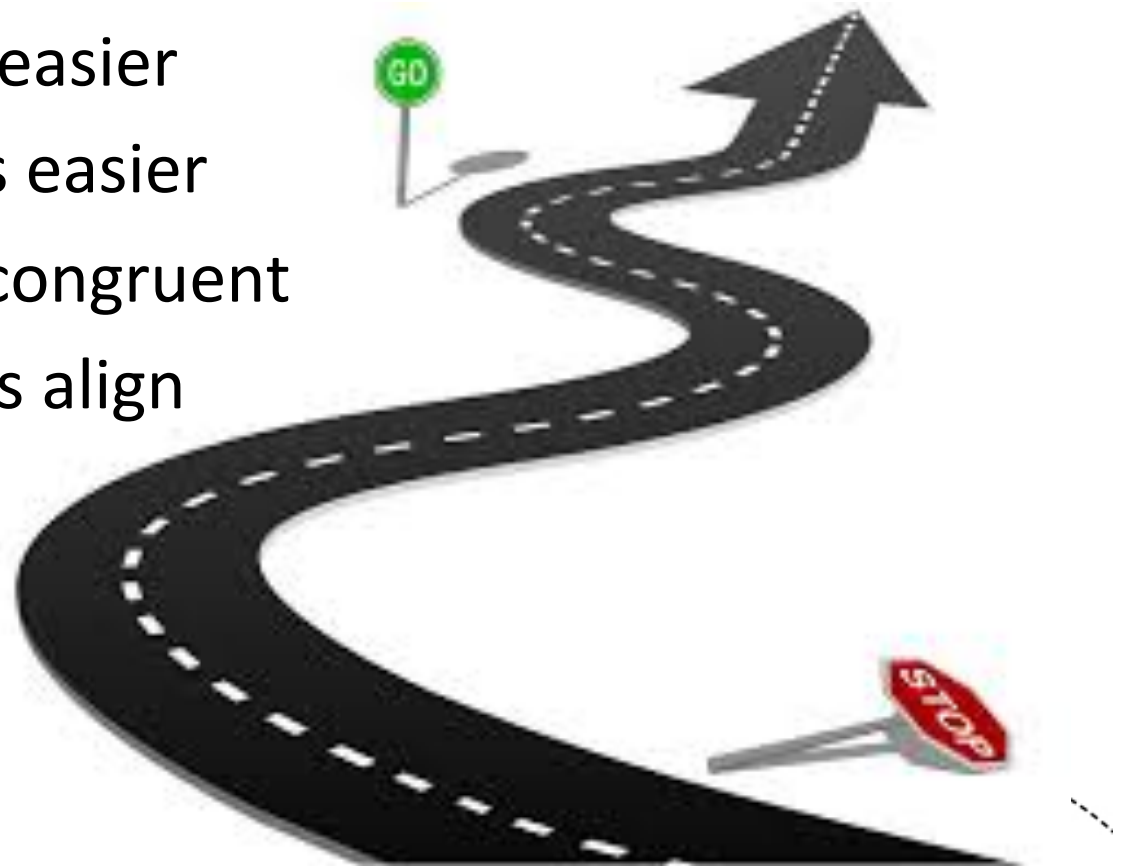
Your Organizational Mission

- Gives an overview of what you are in the “business” of doing
- Be married to it, but not imprisoned by it!
- Let it guide your initiatives



Business Planning for Nonprofits

- When programs and missions align:
 - Grant Planning is easier
 - Program Design is easier
 - Partnerships are congruent
 - Staff qualifications align



Business Planning for Nonprofits

- Strategy to Achieve your Organizational Mission
 - Review your mission statement
 - Does it currently reflect and address a current need within your community?
 - Does it currently allow for movement towards a solution?
 - Are you able to address the need with the help of additional resources?

Business Planning for Nonprofits

– If Yes, then:

- What are the top 3 problems you want to address?
- What do you need (resources) to solve each of these problems?
- Be specific! Money is not a valid answer!

– If No, then:

- Redefine your mission statement until you are able to address all of the questions with a YES!

Business Planning for Nonprofits

- Identifying your Top 3 Initiatives!
 - Determine which has the largest need
 - Determine which is the easiest to address
 - Prioritize



Business Planning for Nonprofits

- For each initiative:
 - Identify 2-3 Goals that you want to achieve
 - Make sure the goals are in SMART format
 - SMART....Specific, Measurable, Attainable, Realistic, and Time Oriented.

Business Planning for Nonprofits

- Case Example: City of Zee Homeless Shelter
 - Organizational Mission: To provide temporary shelter, food and social services to all homeless individuals currently residing in the City of Zee as an avenue and first step towards permanent housing and self sufficiency.

Business Planning for Nonprofits

- Case Example
 - #1 Problem/Initiative: Homeless Individuals in the City of Zee do not know the resources available to them. They do not know that the shelter is offering services and don't know where to go
 - #2 Problem/Initiative: The shelter lacks the strategic partnerships needed to provide a broad array of services
 - #3 Problem/Initiative: The shelter does not maintain contact with individuals once they have moved out of the shelter and are on a path of self sufficiency

Business Planning for Nonprofits

- Case Example:

#1 Problem/Initiative: Lack of Resource Awareness

Solution #1: Conduct street outreach to develop relationships and establish trust with the homeless population

Solution #2: Post directions to the shelter in areas around town inhabited by homeless individuals

Solution #3: Utilize smart phone application for users to provide information to homeless individuals

Business Planning for Nonprofits

#1 Problem/Initiative: Lack of Resource Awareness

Solution #1: Conduct street outreach to develop relationships and establish trust with homeless population

SMART GOAL #1: By August 30th of 2015, audit the city's homeless population, through observation and outreach, resulting in a 10% increase in shelter attendance and 10% increase in social service referrals as compared to 2014 baseline figures.

Business Planning for Nonprofits

- Committing to a Continuous Cycle of Improvement
 - Not all plans go 100% as expected
 - On a quarterly basis re-evaluate your activities
 - On an annual basis re-evaluate your initiatives
 - Determine what can be done better
 - Make the CHANGE!



Business Planning for Nonprofits

- How does this help your pursuit of Grant Funding?
 - You will be able to:
 - Determine if a grant is suitable by reading the program description and comparing it to your organizational mission/initiatives/goals
 - Determine if the grant will fund your needs to address the problem
 - You can start developing your grant application/narrative sooner because you will have planned ahead.

Business Planning for Nonprofits

- Long Term Planning
 - Identify which funder (department specific) is going to fund the majority of your initiatives (federal/state/foundation)
 - Review their long-term calendar of grants and review old RFPs to determine if they are a good fit
 - Develop a yearly calendar of forecasted grants
 - Prioritize grant opportunities and begin planning

Business Planning for Nonprofits

- Long Term Planning
 - Prioritize Grant Opportunities
 - Determine required partnerships
 - Identify/Conduct a Needs Analyses
 - Gather Archival Data
 - Structure desired staffing/ Job Descriptions
 - Request quotes from Vendors
 - Begin discussions of MOUs and Letters of Support
 - Develop budget

Business Planning for Nonprofits

- Hardest part is getting started!
- Don't be afraid to change the plan!
- Even in failure there is still learning and movement in a positive direction!



Need Help?

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- 20 years writing federal, state and foundation grant proposals
- Grant experts available to answer questions at no charge
- Competitive rates for proposal writing
- Technical review & editing

Find Grant Opportunities



- Sign up for FREE Grant Siren email alerts
- Grant research – an affordable custom research service to identify grant opportunities that are specifically aligned with the areas where you need funding

Resource Associate Services

- Grant Research
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- Partnership Development
- Grant Writing Training
- Capital Campaigns
- 501c3 Development and Program Evaluation



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