

THE STRATEGIC PLANNING STARTER GUIDE FOR EMERGING ORGANIZATIONS



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WHY STRATEGIC PLANNING MATTERS!



Strategic planning is not just for large organizations. For small and emerging entities, it's the difference between simply surviving and growing with purpose. A strategic plan creates clarity, structure, and direction, especially when your team is stretched, your programs are growing, or your community's needs are shifting.



GROWTH REQUIRES MORE THAN FUNDING

Even if you are successfully securing funding, without a strong backend — clear governance, solid systems, and a strong operational foundation — your organization won't be able to sustain its growth. Funding can get you started, but strong infrastructure keeps you standing.

THREE REASONS IT MATTERS RIGHT NOW:

DIRECTION & FOCUS

Strategic planning helps your team understand where you're going and what matters most. It minimizes guesswork and ensures that time, resources, and energy are used intentionally.



STRONGER STAKEHOLDER RELATIONSHIPS

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BETTER DECISION-MAKING

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WHAT A STRONG STRATEGIC PLAN INCLUDES

A powerful strategic plan for nonprofits doesn't need to be complicated. It needs to be clear, achievable, and aligned with your mission.



✓ VISION & MISSION ALIGNMENT

A refreshed or reaffirmed understanding of who you are and why you exist.

✓ KEY STRATEGIC PRIORITIES (3–5)

These are the big areas of focus that move your mission forward.

✓ GOALS & SUCCESS INDICATORS

For each priority, define what success will look like and how you will measure it.

✓ IMPLEMENTATION ROADMAP

A high-level plan that outlines timelines, responsibilities, and resources.

✓ MONITORING & REVIEW PROCESS

Strategic plans shouldn't sit on a shelf. Build a simple process for tracking progress, reviewing goals, and adjusting when needed.



SIGNS YOUR ORGANIZATION NEEDS A STRATEGIC PLAN

1 YOU'RE RESPONDING TO EVERY OPPORTUNITY AND PUTTING OUT FIRES DAILY

2 YOUR BOARD WANTS CLEARER DIRECTION

3 STAFF ARE UNCLEAR ABOUT ROLES OR PRIORITIES

4 PROGRAMS HAVE GROWN FASTER THAN SYSTEMS

5 YOU NEED TO DEMONSTRATE IMPACT FOR FUNDERS

6 THERE'S NO SHARED UNDERSTANDING OF LONG-TERM GOALS

7 YOU'RE PREPARING FOR LEADERSHIP TRANSITIONS OR GROWTH

8 YOU'RE RECEIVING FUNDING, BUT YOUR BACKEND, GOVERNANCE, OR INTERNAL SYSTEMS AREN'T STRONG ENOUGH TO SUSTAIN IT LONG-TERM



STRATEGIC READINESS SCORECARD

This scorecard will help you quickly understand where you are today and what might need strengthening before you begin a planning process. Read each statement and select YES or NO based on what is true for your organization today. There are no perfect scores — just be honest.

When you finish, count the number of YES answers to find your readiness level. This tool is designed to help you quickly see whether your mission, governance, systems, and day-to-day operations are ready for strategic planning — or if strengthening the foundation should come first.

- ☐ WE HAVE A CLEAR MISSION AND VISION THAT GUIDE OUR WORK.
- ☐ WE KNOW OUR TOP PRIORITIES FOR THIS YEAR.
- ☐ OUR BOARD AND STAFF AGREE ON THE DIRECTION WE'RE HEADING.
- ☐ OUR OPERATIONS RUN SMOOTHLY WITHOUT CONSTANT FIRE-FIGHTING.
- ☐ OUR GOVERNANCE DOCUMENTS ARE UPDATED AND ACTUALLY USED.
- ☐ ROLES ARE CLEARLY DEFINED AND PEOPLE KNOW WHO DOES WHAT.
- ☐ WE HAVE BASIC SYSTEMS IN PLACE (FINANCE, RECORDS, REPORTING)
- ☐ WE CAN SHOW FUNDERS HOW WE MEASURE IMPACT.
- ☐ STAFF/VOLUNTEERS UNDERSTAND THE MISSION AND THEIR PART IN IT.
- ☐ WE HAVE THE CAPACITY TO GROW WITHOUT BURNING OUT.

HOW TO READ YOUR RESULTS

0–3 YES = At Risk

Your foundation is weak. Strategic planning is urgently needed.

4–7 YES = Needs Alignment

Some strengths exist, but the organization isn't ready to sustain growth.

8–11 YES = Ready for Strategic Planning

Your foundation is strong — now it's time to build your 2–3 year roadmap.

THE UBUNTU 3-PILLARS STRATEGIC PLANNING FRAMEWORK

PURPOSE

Clarify who you are, where you're going, and what matters most. This includes your mission, vision, values, and the priorities that will guide your next 2–3 years.

PEOPLE

Align the individuals who carry the organization — board, staff, volunteers, and key partners. This ensures everyone understands their role, is pulling in the same direction, and feels connected to the mission.

PROCESS

Strengthen the systems and governance that hold everything together. This includes policies, decision-making structures, financial processes, communication flows, and the backend needed to sustain growth.

WHY THIS FRAMEWORK WORKS

Because strategy is not just a document — it's a balance of clarity, alignment, and infrastructure.

When these three pillars are strong, organizations can grow with confidence, make better decisions, and sustain their funding over time.

Strategic Planning Kickoff Meeting Agenda

A simple tool to help your team begin the planning conversation.

Welcome & Purpose of the Meeting (5 minutes)

Set the tone: this is a conversation, not a decision-making session. Share why strategic planning matters for your organization right now.

Mission & Vision Check-In (10 minutes)

Discuss whether your mission still reflects who you are and if your vision is still what you're aiming toward. No rewriting—just gut reactions.

What's Working Well? (10–15 minutes)

Discuss strengths, programs, or practices that should continue. This helps the team start with appreciation and clarity.

What's Not Working or Causing Strain? (10–15 minutes)

Discuss areas where the team feels overwhelmed, unclear, or stretched thin. This naturally surfaces governance, systems, and capacity gaps.

Top 3 Priorities We Think We Should Focus On (15 minutes)

Each person lists their top three. Identify patterns as a group—not decisions.

Initial Questions for the Strategic Planning Process (10 minutes)

Examples: Who must be included? What information or data do we need? What timelines make sense for us?

Next Steps (5 minutes)

Clarify what comes next. Decide whether to move forward with external support. Identify who will lead internal coordination.

Helpful Tips

- This meeting is about listening, not solving.
- Capture themes, not full solutions.
- Use this agenda to prepare for a deeper planning process.





A strong plan ensures that your mission, operations, and governance work together. It bridges the gap between receiving funding and being truly ready to manage, sustain, and grow with that funding.

THANK YOU

If this guide sparked new ideas or highlighted gaps in your organization's foundation, let's connect. I provide practical, grounded support for small and emerging organizations that want to build strong systems and sustainable impact.

 17 Book a Consultation: www.ubuntucs.com/contact



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