



# The “Y” in Strategy

November 15, 2023

- ▶ Presented by Ivy R. Buchan, PhD
- ▶ President of Helix Strategies, LLC

1...2...3



Let's Go!



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**Examine**

What strategic planning means

**Explore**

Strategic planning benefits

**Review**

CommunityAid example



Dr. Ivy R. Buchan, [ivy@helixllc.org](mailto:ivy@helixllc.org)

## Services

- ▶ Strategic solutions to fundraising and leadership challenges
  - ▶ Fundraising
  - ▶ Strategy
  - ▶ Board of Directors
  - ▶ Nonprofit Management
  - ▶ Research & Evaluation

## Background

- ▶ 20+ years of experience
- ▶ Started two nonprofits and edited three nonprofit textbooks
- ▶ PhD, Administration and Leadership in the Nonprofit Sector (research focus: engagement and multidisciplinary team collaboration)
- ▶ Adjunct Professor at West Chester University
- ▶ Lifelong Volunteer

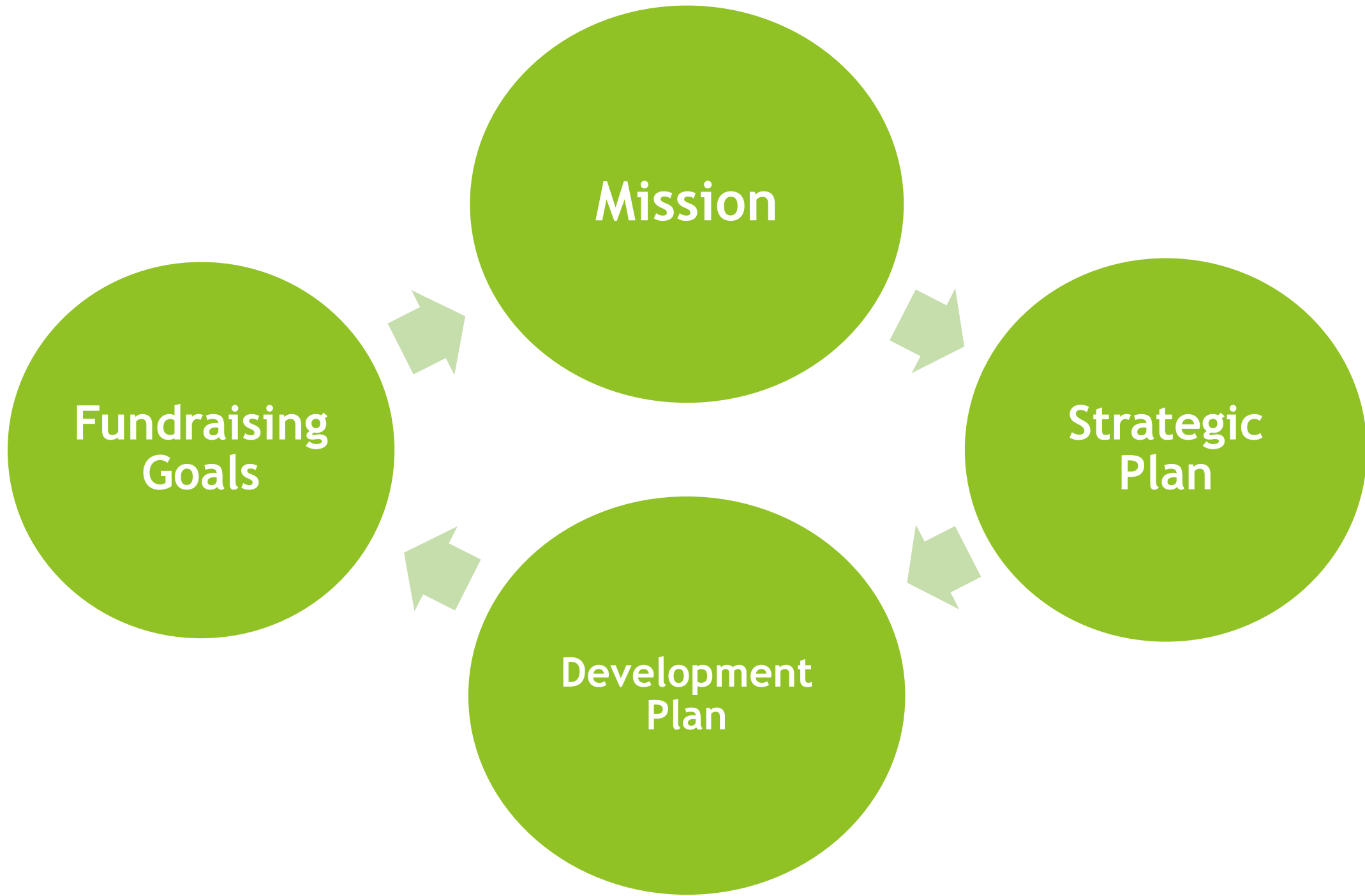


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Licensed Consultant

**AFP** Master Trainer

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VS



# "But I hate strategic planning..."

- ▶ Confirm Your Mission
- ▶ Know Your Numbers
- ▶ JEDI
- ▶ Succession Plan
- ▶ Board Matrix
- ▶ Cost Per Service
- ▶ Event Assessment
- ▶ Donor Growth/Retention Rate
- ▶ Development Department Assessment
- ▶ Conversion Rate
- ▶ Open-discussion board meeting

# WSYP: Our mission is to...

Connect to  
other  
professionals,

Networking events

Quantitative and  
qualitative survey  
data, attendance,  
collaborative  
partnerships

Serve those in  
need,

Quarterly  
community services  
projects

Compare to  
criteria,  
attendance

And grow as  
individuals.

Monthly  
educational  
workshops

Quantitative and  
qualitative survey  
data, attendance

What does success look like for your organization?



# Mission

Objective

Action

Action

Action

Objective

Action

Action

Action

Objective

Action

Action

Action



# Strategic Planning Tips

- ▶ Create \_\_\_-\_\_\_ year plan
- ▶ \_\_\_-\_\_\_ goals
- ▶ Room for calculated/informed risk
- ▶ Address one variable at a time
- ▶ Factor in your culture and structure
- ▶ Document board approval
- ▶ Best time to do a SP is \_\_\_\_\_.



# Why have a Strategic Plan? (just to name a few)

- ▶ Best Practice
- ▶ Avoid Sunk Cost Fallacy
- ▶ Assess your process and choices
- ▶ Educate your donors/stakeholders
- ▶ Avoid assumptions
- ▶ Know when to celebrate
- ▶ Easier to say no
- ▶ Sequential contrast effects
- ▶ Identify patterns
- ▶ Anecdotal sway
- ▶ Fundraising direction

What will the next wave be?





# Mission vs. Vision

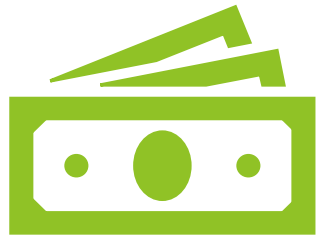


# CommunityAid + Foundation

- ▶ 10% off the top!
- ▶ What do our Partners *really* need?
- ▶ What are we uniquely positioned to do?
- ▶ How can we have greater impact in our communities?
- ▶ 4-year plan



# CommunityAid FOUNDATION



## Philanthropy

Care Cards

Annual Grants

10X Grants

Sugar Fund

Collaborative Funding



## Education

LIFTS



## Shared Services

- ▶ Vetted Experts
- ▶ Nonprofit Experience
- ▶ Better Together
- ▶ Increase Efficiency



The CommunityAid Foundation is pleased to provide a menu of shared services to support our partners. These are standard, recurring services required to operate all nonprofits and selected with understanding of your need to receive high quality support while you focus on your mission. All services are negotiated by the CommunityAid Foundation to support your team at affordable prices. We want you to be able to work directly with providers who care about our community and your cause.

## SHARED SERVICES

### OUR VENDORS: (this is a benefit to partners who are eligible through LIFTS)

ACCOUNTING	 B&R ACCOUNTING LLC	Boyer & Ritter will serve as the Accounting Partner for the Shared Services component of the LIFTS Program	717.761.7210 dmaribedi@cpabr.com, jscheibel@cpabr.com, ke-sars@cpabr.com
PRINT & MARKETING	 KONHAUS PRINT MARKETING	Konhaus Print & Marketing is a woman owned, small business specializing in graphic design, print, branded merchandise, direct mail, signage, and apparel.	717.731.9456 sarah@konhaus.com
WEBSITE	 ROUND4	Round4 Creative's specialties include: website design, development, and site maintenance.	717.319.2803 jason@round4creative.com
VIDEO PRODUCTION	 COMMUNITYAID FOUNDATION	CommunityAid is proud to offer a wide variety of video production options to meet the needs of our nonprofit Partners.	518.651.6422 mhealy@communityaid.org
NONPROFIT MANAGEMENT	 Helix STRATEGIES	Helix Strategies, LLC works with organizations to create strategic solutions to fundraising and leadership challenges. Service areas include: fundraising, nonprofit management, strategy, research and evaluation, and board of directors.	717.857.7432 ivy@helixllc.org

To confirm eligibility for Shared Services, contact your partner liaison. All questions about services should be directed to the contact information for the provider listed above.

# Additional Support

- ▶ Exercise your board resources
- ▶ Hire an objective party
- ▶ Talk to your accounting professional
- ▶ Donor database support
- ▶ Check
  - ▶ Charity Navigator
  - ▶ GuideStar
  - ▶ Better Business Bureau





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Explore strategic planning benefits



Review CommunityAid example



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