



Championing and Empowering Florida Museums

Strategic Plans: From Boring to *Soaring!*

Alyce Lee Stansbuy, CFRE, President, Stansbury Consulting

October 14, 2025

Goals for this session

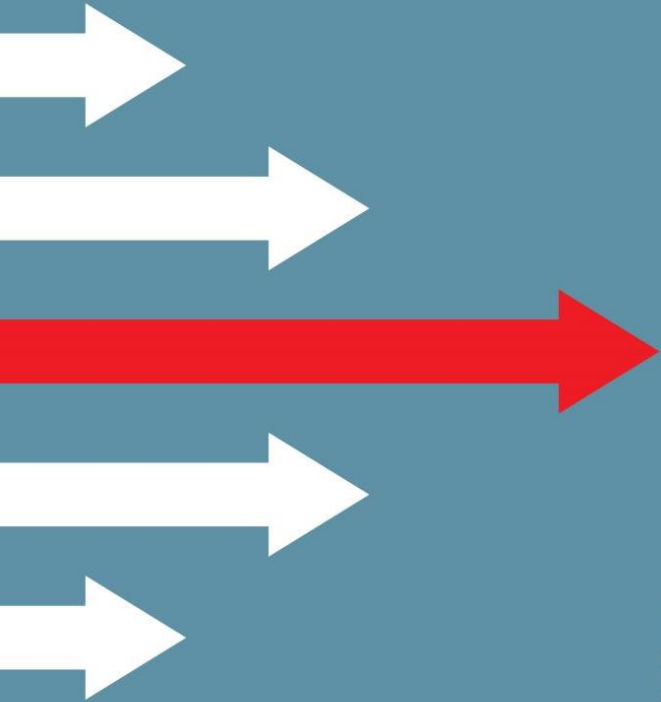
- Share best practices for effective planning.
- Clarify role of board/staff.
- Identify pitfalls to avoid.
- Explore use of strategic plan to raise more money.

NOW THAT WE'VE BRAINSTORMED ALL OF THESE EXCITING NEW IDEAS, IT'S TIME TO SORT THEM.



Does your organization have a written, board-adopted Strategic Plan?





Strategic planning process helps an organization:

- Clarify its mission and goals.
- Make informed decisions about current realities.
- Realistically assess strengths and limitations.
- Set clear priorities and a plan to achieve them.
- Anticipate and respond to change.
- Target spending appropriately.
- Reshape programs, fundraising, and operations to achieve outcomes.
- Evaluate results and revise/adjust.

Benefits of Strategic Planning

1. Describes shared vision, mission, values.
2. Roadmap that defines desired future.
3. Creates culture of accountability & accomplishment.
4. Builds teamwork.



Benefits of Strategic Planning

5. Fortifies organizational performance.
6. Grows maturity of nonprofit.
7. Enhances credibility.
8. Tool for fundraising; board and staff recruitment; and partnerships.



Types of Plans

Strategic Plan:

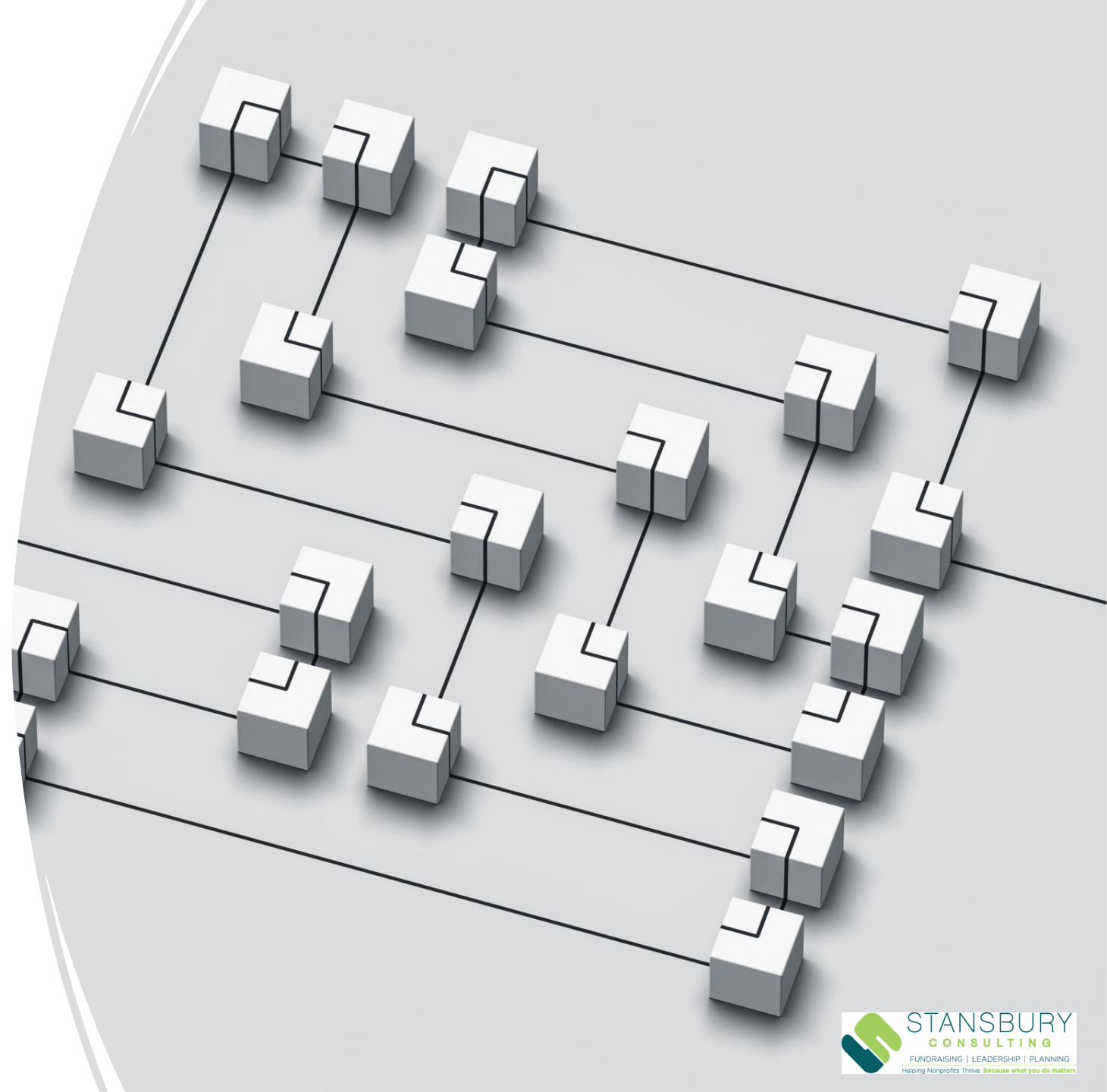
in-depth process that includes internal and external feedback; market analysis; priority goals, strategies and measurable outcomes

Action Plan:

focus on short-term priorities; get right things done in the right order

Bridge Plan:

continuation of an existing plan



Types of Plans

Tactical Plan:

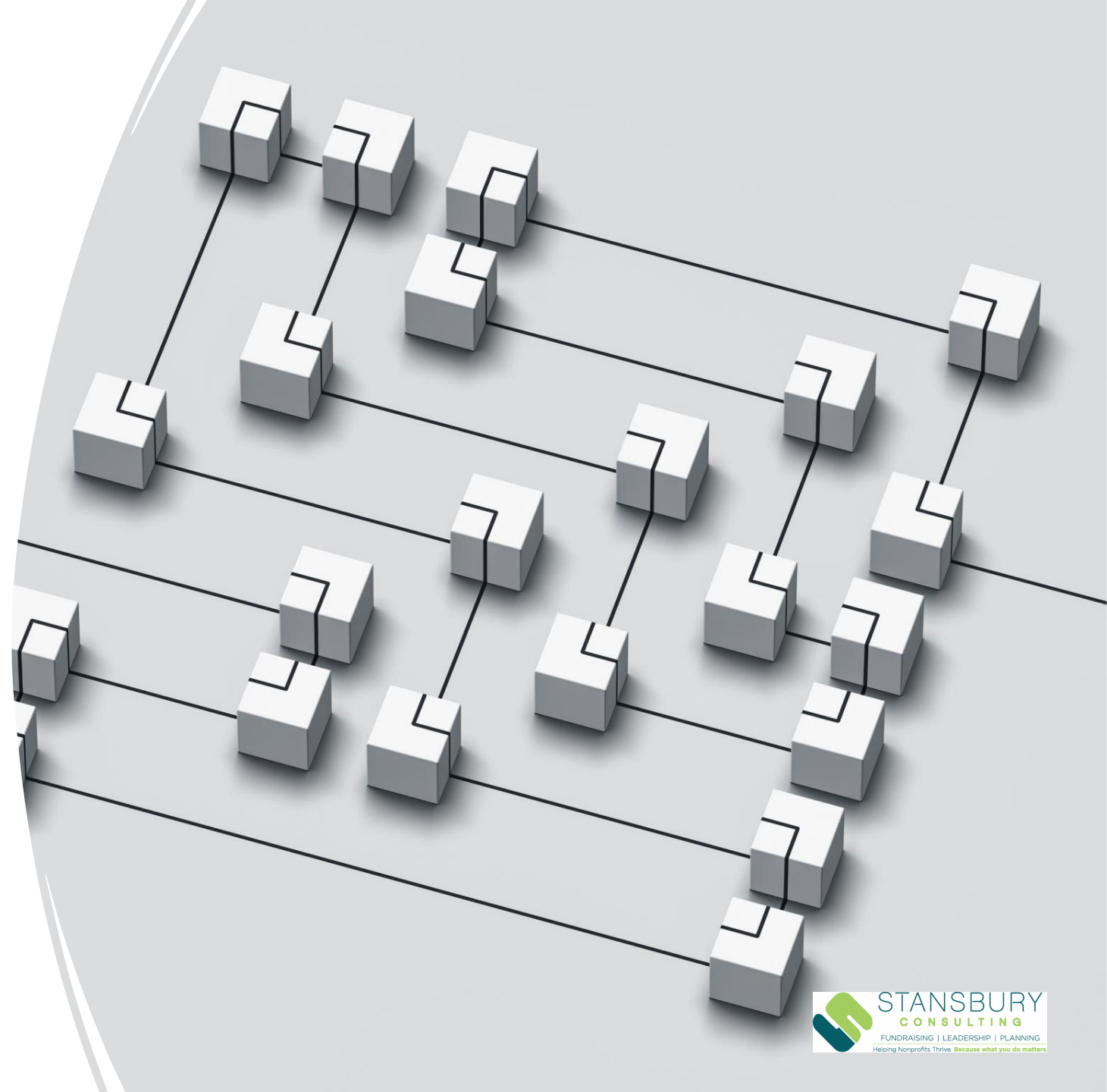
“Ad-hoc”; single focus with a defined end

Scenario Plan:

plausible alternatives to help identify relevant course of action (recession, COVID, loss of funding)

Turn-around Plan:

Focused on continuity; “right-size” goals with financials



Pair & Share

Do you have the right
plan for your
organization
right now?

If not, what's needed?





Board & Staff Roles

| ROLE OF BOARD | ROLE OF ED/CEO |
|--|---|
| Develop mission, vision, strategic direction | Provide vision and strategic direction |
| Approve budget and set financial goals | Ensure plan is rooted in mission & vision |
| Utilize strategic plan to guide the board's work including meetings, committees, and decision-making | Ensure financial, human and operational resources are aligned with strategic goals and can be used to achieve them. |
| Identify, cultivate & seek financial resources to fund the plan | Engage diverse stakeholders |
| Review management's performance to achieve outcomes | Oversee implementation of and measure progress towards objectives |
| Assess board's performance to achieve outcomes | Advocate for & communicate the plan to public, staff & key stakeholders |

Key Elements of a Strategic Plan

VISION:

SHORT, “BLUE SKY” VIEW OF FUTURE
IDEAL STATE

MISSION:

INSPIRATIONAL SUMMARY OF WHY WE EXIST,
WHAT WE ARE HERE TO ACCOMPLISH

CORE VALUES:

DEFINES OUR CULTURE, HOW WE WILL OPERATE
AND WHAT WE WANT TO BE KNOWN FOR



A clearly articulated vision:

- Shares where you are heading and why.
- Provides inspiration to those you are leading.
- Touchstone for decision-making.
- Friendly reminder of why you keep on going.
- Help refocus when you're confused with details or frustrated by setbacks.
- Keeps you, and the people with whom you share your vision, on track.



Vision Statements

- **National Children’s Museum:** a world where all children feel curious, confident, and prepared to be future leaders and innovators
- **National WWII Museum:** to inspire people, young and old, to embrace the lessons of this monumental global conflict from its stories of heroism, human tragedies, voices of liberation, and the fruits and responsibility of victory.
- **San Diego Zoo:** to become a world leader at connecting people to wildlife and conservation.
- **Smithsonian:** Shaping the future by preserving our heritage, discovering new knowledge, and sharing our resources with the world.

Internal Feedback

- SWOT Analysis
- Board & Staff feedback
- Member & volunteer surveys
- Focus groups
 - Donors
 - Docents
 - Instructors
 - Parents
 - ETC

External Input

- Stakeholder Interviews
 - Funding partners
 - Major donors
 - Community partners
 - Collaborators
 - Government reps
 - Founders
 - Loyal supporters
- Visitor Feedback
- Market Analysis
- Focus groups

Pair & Share

What's one way you can add or enhance internal and external feedback in your planning process?



Market Analysis

- Research, studies, reports
- External Factors
- Nonprofit & Industry Trends
- Comparable Organizations
- Stakeholder Feedback
- Community Needs

Strategic Planning Components

Major Themes

Topics that emerge from research, interviews, market analysis, and discussion.



Outputs vs. Outcomes

Outputs: activities done by the nonprofit.

Ex. # meals served by a soup kitchen.

Outcomes: observed effects of the outputs on the beneficiaries of the nonprofit.

Ex. degree to which meals served by soup kitchen reduced hunger in the population of people served by the soup kitchen.



Pitfalls to avoid

- No written plan
- Wrong type of plan
- Plan isn't relevant or realistic
- No Board engagement
- No staff input
- Lack of ownership/buy-in
- No measurable outcomes
- Not asking tough questions
- Not monitoring & updating the plan

Discussion

What pitfalls have
you experienced?

Any tips to avoid?



If you **DON'T** have a plan:

1. Start with a board discussion(s).
2. Consider a board assessment or survey.
3. Do your homework.
4. Educate board about planning before you begin.



If you **DO** have a plan:

1. Utilize plan to guide Board meeting agendas.
2. Dedicate meeting time to discuss progress, outcomes, changes.
3. Evaluate goals and strategies
4. Monitor progress.
Make changes as needed.





TURN
TO CLEAR
VISION

“Why didn’t you
give a
\$10,000 gift?”

Nonprofit

“You didn’t give me
a \$10,000 reason.”

Donor

Strategic Fundraising

- Align Fundraising Goals with Strategic Goals
- Engage donors/funders in your VISION.
- Build partnerships.
- Invite input, share challenges, and celebrate success.
- Reports on results.



Strategic Plans

BORING

SOARING!

| | |
|---|---|
| Repeat of previous plan / maintain status quo | Visionary, forward thinking, new ideas |
| Dense text, lots of jargon. | Clear, concise, easy to understand. |
| Too many goals & strategies | Succinct and packed with <i>power</i> . |
| Stand alone strategies. | Integrated goals & strategies that support and build on each other. |
| Unrealistic goals, timelines, outcomes | Realistic and SMART |
| Operational / 100% internally focused | Reflects external landscape / engages the community |

What is your
'ah-ha' moment or
best
take-away
from this session?





Best wishes!

Alyce Lee Stansbury, CFRE

X: @StansburyCFRE

