

Strategic Planning That Actually Works



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A Winchester, Virginia resident, Andy brings a **corporate leadership and business strategy background** to the nonprofit sector — leading United Way NSV with a **results-driven, collaborative approach** nearly a decade in the making.

- Builds **cross-sector partnerships** connecting local government, businesses, and nonprofits to tackle complex community challenges
- Serves on Fremont Street Nursery, Winchester DSS, Virginia Ed Strategies, and Top of Virginia Regional Chamber boards
- First-ever **Emerging Leader Award** recipient from the Top of Virginia Regional Chamber

The Hook: Is Your Nonprofit Alive or Just Walking Dead?



The question isn't whether your doors are open.
It's whether your mission is still alive.

Some organizations are technically functioning.
They file the reports. They hold the meetings.
They apply for the grants.

But functioning isn't the same as thriving.

A zombie nonprofit has lost its vitality, its
strategic direction, and its real connection
to the community it exists to serve.

It's going through the motions — and it spreads
that culture to everything around it.



Thinking Strategically: Signs of the Infection

You don't become a zombie overnight. It happens gradually — and it often looks like hard work.

- **Burnout Becomes a Badge of Honor**
 - Exhaustion is celebrated. Boundaries are blurred. Staff turnover is quietly normalized — and nobody asks why.
- **Programs Chase Funding, Not Mission**
 - The work starts to look like whatever the current RFP asks for. Purpose gets fuzzy. Strategy becomes reactive.
- **Data Is Collected — But Never Used**
 - Numbers go into reports and reports go into folders. Nothing changes. No one asks what the data is actually telling you.
- **Silos Replace Collaboration**
 - Teams hoard knowledge. Departments stop talking. "That's not my lane" becomes the unofficial org motto.
- **The Community Is Talked About — Not With**
 - Staff assume what people need. Feedback loops are broken or nonexistent. The people you serve become statistics instead of partners.



Every good survival strategy starts with a threat assessment. Consider this yours.





The Outbreak Doesn't Stay Contained: One struggling organization is a problem. A sector full of them is a crisis.

- **Nonprofits Compete Instead of Collaborate**
 - Same mission. Same community. Same funders. No coordination.
 - The result is duplicated effort, fragmented services, and people falling through the gaps between organizations that should be working together.
- **Outdated Programs Keep Running**
 - Not because they work — but because nobody wants to be the one to stop them.
 - "We've always done it this way" is the most dangerous sentence in the nonprofit sector.
- **Strategy Follows Funders, Not Community**
 - When the money moves, the mission moves with it.
 - Organizations stop asking what the community needs and start asking what the next grant cycle rewards. The work becomes scattered. The impact shrinks.
- **Knowledge Dies in Silos**
 - No shared learning. No collective strategy. Every organization reinventing the wheel — alone — while the community waits for solutions that already exist somewhere down the street.

**This isn't about bad organizations or bad people.
It's about a system that rewards survival over impact.
That's the real infection — and it's time to develop a
different strategy.**



The Cure Exists: And It Starts With Culture

Thriving organizations don't just avoid the symptoms. They build something strong enough that the infection can't take hold.

- **Culture Is Contagious ... Make Sure Yours Is Worth Spreading**
 - The way your team operates, communicates, and makes decisions doesn't stay inside your walls.
 - It influences every partner, every funder, and every person you serve.
 - Healthy culture spreads just as fast as toxic culture. Choose intentionally.
- **Data Drives Decisions, Not Dust**
 - Thriving orgs don't collect metrics to satisfy a report. They use data to ask better questions, challenge assumptions, and change course when something isn't working.
 - Numbers should make you uncomfortable sometimes. That's the point.
- **Collaboration Over Competition**
 - The strongest organizations know they can't serve the whole community alone... and they don't try to.
 - They share knowledge, co-design solutions, and measure success by what the sector achieves, not just what they can claim credit for.
- **Community Is A Partner, Not An Audience**
 - Thriving orgs don't assume they know what people need. They ask. They listen. They change their programs based on what they hear — even when that's inconvenient.
- **Be Willing To Bury What No Longer Serves**
 - The hardest survival skill isn't starting something new. It's having the courage to end something old.
 - Thriving orgs regularly ask: is this still working? Is this still needed? Is this still us?



Every good survival strategy starts with a threat assessment. Consider this yours.



Your Next Move: The Outbreak Isn't Over.

But now you have a survival plan.

- **One Action:**

- Before you leave this room, identify one undead habit in your organization (something you're still doing out of inertia, obligation, or fear) and name it out loud.

- **Because here's what we know:**

- Organizations that name the problem are the ones that solve it.
- Organizations that stay silent are the ones that shuffle forward... technically alive, meaningfully absent.



The sector needs you fully alive. Not just filing reports. Not just attending meetings. Not just surviving the grant cycle. Alive. Strategic. Connected to the mission that brought you here in the first place.

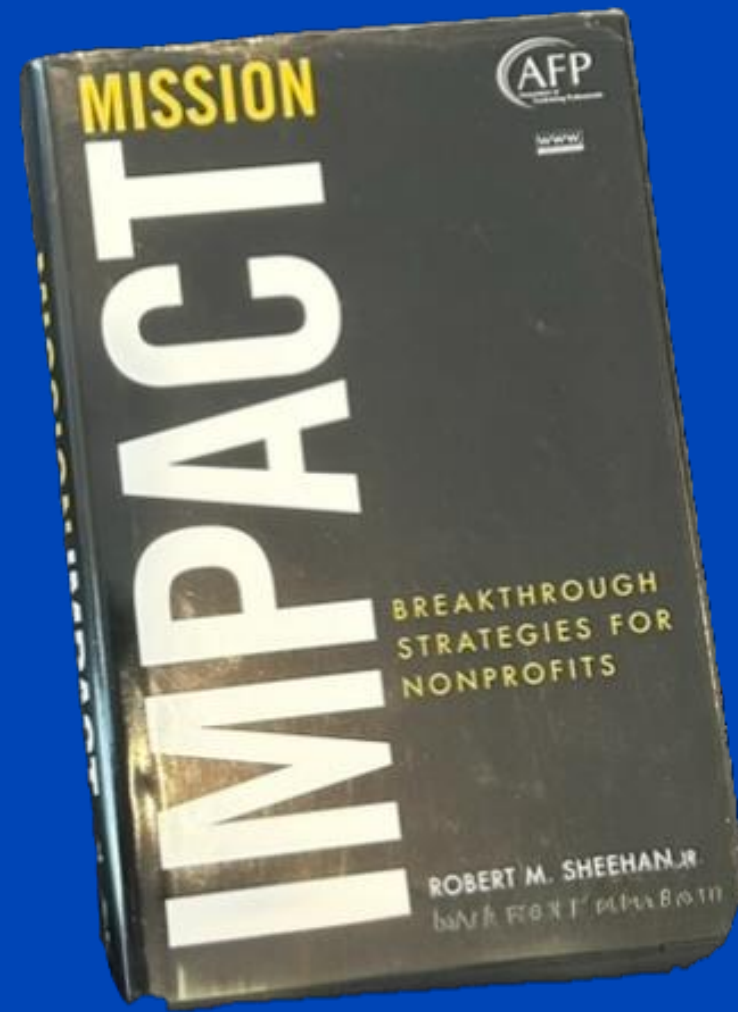
Bill Kitson

Kitson Strategy LLC



- **35+ years of leadership experience** in United Way and nonprofit organizations
- Former **President & CEO of United Ways** in Cleveland, Toledo, and Champaign County
- Former **Director, U.S. Central Region – United Way Worldwide**, supporting more than 450 United Ways
- Led fundraising initiatives generating **over \$350 million** for community impact
- Currently advising United Ways nationwide on **strategy, governance, and resource development**

Mission Impact



Opening Questions

How many of you have a strategic plan?

How many of those plans actually guide decisions every month?



Why This Model Was Developed

This approach grew out of working with United Ways facing:

- Limited staff capacity
- Busy boards and volunteers
- Growing expectations for measurable impact
- Strategic plans that often sit on shelves



Five Strategic Planning Mistakes

1. Trying to do too many things
2. Confusing activity with strategy
3. Skipping the mission gap conversation
4. No clear strategy narrative or story
5. No implementation discipline



A Simple Way to Think About the Process

Three Phases

1. Understand the Mission and Community
2. Decide Where to Focus
3. Turn Strategy into Action



Mission Impact Strategy Process



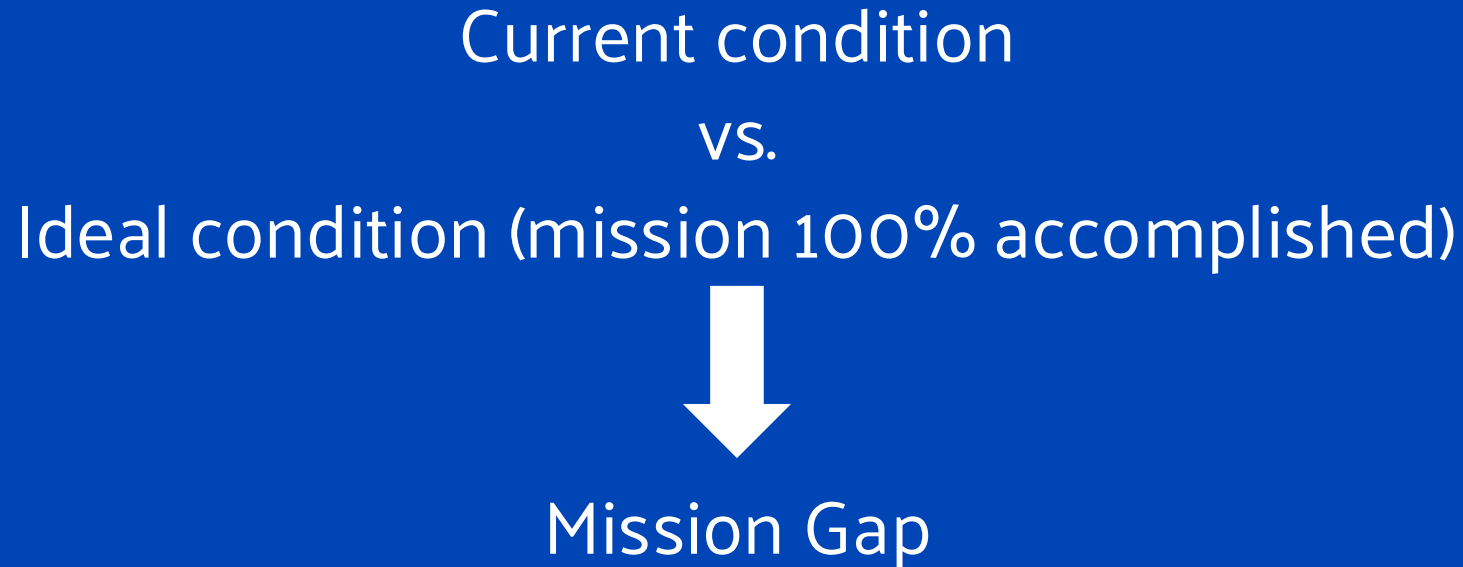
Mission Clarification

What impact is our mission calling us to create?

- What impact are we trying to create?
- What is our highest intrinsic value?
- What would it look like if we achieved 100% of the mission?



Mission Gap



Strategy is about closing the gap between today's reality and what our mission calls us to create.



Exercise: Mission Gap Reflection

Think about your United Way.

What is the biggest gap between your mission and current reality?

Discuss briefly with someone near you.



Mission Impact Vision

With our current environment in mind – including our “mission gap” – think about how we could make “quantum leap” progress on our “mission gap” if United Way existed in an “ideal state.”

Answer the question:

“If you could have it any way you wanted, what would United Way be like?”

Describe it in detail.



Strategic Stretch Goals

Set 3 to 5 Strategic Stretch Goals for the next five years which:

- Inspire you!!!
- Will catapult United Way of Southeast Mississippi toward the vision and help close the Mission Gap most effectively
- Meet the **Almost Impossible SMART criteria**
- At least one goal should be connected to meeting the Mission



Organizational Assessment

Important to consider:

- Stakeholder Conversations
- Thriving United Way Self-Assessment
- SWOT Analysis
- Internal Capacity Review

Ensure strategy is **grounded in reality.**



Strategy Development

Most organizations struggle to answer:

Who are we?

Where are we going?

How will we get there?



What is Strategy?

- Strategy is more than strategic planning
- Strategy is not just a collection of goals and budget forecasts
- Most organizations have plenty of plans, but very little strategy
- The purpose of having a strategy is to guide the organization toward its desired future.



Strategy Narrative

A Strategy Narrative is a three to four paragraph summary explanation of the organization's strategy.

Most organizations, in all sectors, cannot articulate their strategy with a simple coherent statement.

Answers the question: How will we create greater impact?



Strategy Narrative

United Way of West Central Mississippi Strategy Narrative

United Way of West Central Mississippi (UWWCM) is committed to building a thriving community by mobilizing resources to deliver measurable impact across the region. Our strategy is rooted in addressing the significant "mission gap" between our current state and our vision of an ideal future. This gap includes challenges such as limited community awareness, low volunteer engagement, and insufficient financial resources, which have constrained our ability to fully realize our mission.

To overcome these challenges, UWWCM has set ambitious strategic stretch goals for the next five years. These goals include increasing volunteer participation from 2% to 10% of the community, raising \$7.5 million in revenue, and enhancing our advocacy efforts. We aim to increase our social media relevancy, ensuring 50% of those who engage with us online become aware of our services and programs. These goals are designed to propel us toward our vision of a fully engaged and supportive community, with robust partnerships and sustainable resources.

Our strategy also recognizes the importance of creating an aligned Community Agenda which will focus our community work on having a purposeful impact with true investments. We will work holistically and collaboratively, making sure it is measurable. We will leverage UWWCM's strengths, such as our dedicated staff, deep community connections, and a reputation for transparency and accountability. At the same time, we are committed to addressing our weaknesses, including staff shortages, funding limitations, and a lack of community understanding of our role. By seizing opportunities to grow our revenue, volunteer base, and social media presence, while mitigating threats posed by economic challenges and outdated technology, we are positioning UWWCM for sustainable success.

Ultimately, our strategy is about more than just achieving goals—it's about guiding UWWCM toward its desired future. Through a coherent and integrated approach, we will create a lasting impact in West Central Mississippi, ensuring our efforts lead to a thriving, resilient community for all residents.

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Strategy Implementation

The implementation plan identifies the **specific actions needed to advance the strategy.**

It is **not the organization's entire workplan.**

Instead, it focuses on:

- Key initiatives that move the strategy forward
- Leadership responsibility for each initiative
- Early milestones and timelines
- Measures that track strategic progress



How it works in practice ...

Michele Connelly

Executive Director

United Way of West Central Mississippi



Three Ideas to Take Back

- 1 Strategy begins with the **mission gap**
- 2 Impact comes from **focus**
- 3 Strategic planning should **simplify your work**

Strategy is the bridge between mission and measurable impact.



Continuing the Conversation ...

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Thank You

