Strategic Planning for Non-Profit Organisations: Mission, Portfolio and Sustainability

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Technical depth: Conceptual · **Practical mode:** Case study

Introduction

Non-profit strategic plans often become wish lists: every programme continues, every donor request is accepted and the plan sits on a shelf until the next cycle. Meanwhile funding grows more competitive and donors ask for evidence of impact. This Core Concept course equips chief executives and board members to make real strategic choices, using frameworks built for mission-driven organisations, from the Strategy Change Cycle to the Sustainability Matrix Map. Participants test those frameworks on non-profit cases and leave with a Strategic Plan Framework for their own organisation.

Course Objectives

- Diagnose the organisation's mandates, environment, stakeholders and capacity as the basis for strategic choices
- Select non-profit strategy frameworks, including the Public Value Triangle, Theory of Change and the Sustainability Matrix Map, to fit the organisation
- Make programme portfolio decisions that balance mission impact against financial viability
- Set the vision, strategic goals, funding model and performance measures that a board can approve and monitor
- Anticipate funding shocks, mission drift and execution risk, and define how strategy cascades into annual plans
- Produce a Strategic Plan Framework ready for board discussion

Target Audience

- Chief executives and executive directors of charities, associations and foundations
- Board chairs and trustees responsible for approving and monitoring strategy
- Heads of strategy, planning and performance in non-profit organisations
- Programme directors who lead major service portfolios
- Senior leaders of grant-making foundations who shape funding strategy

Course Outline

Day 1: The Strategic Context of the Non-Profit Organisation

- Bryson Strategy Change Cycle for Public and Non-Profit Organisations
- Mandates and Mission Analysis: Legal Purpose, Founding Documents and Donor Restrictions
- External Environment Scan Using PESTLE and Sector Trend Analysis
- Stakeholder Analysis with the Power-Interest Grid for Donors, Beneficiaries and Partners
- Organisational Capacity Review Using the McKinsey Capacity Assessment Grid

Day 2: Strategy Frameworks for Mission-Driven Organisations

- Moore's Public Value Strategic Triangle
- Theory of Change and Logic Model Design
- MacMillan Matrix for Programme Portfolio Decisions
- Sustainability Matrix Map: Mission Impact versus Financial Viability
- Balanced Scorecard Adapted for Mission-Driven Organisations

Day 3: Formulating the Strategy

- Strategic Issues Identification and Prioritisation Grid
- TOWS Matrix for Strategic Option Generation
- Vision, Strategic Goals and SDG Alignment Mapping
- Funding Model Choice: Diversified, Earned Income, Endowment and Institutional Funding
- Strategy Map and KPI Selection for Mission and Financial Results

Day 4: Strategy Risk, Execution and Problem Cases

- Scenario Planning for Funding Shocks and Policy Change
- Strategic Risk Register Aligned to ISO 31000:2018
- Mission Drift, Donor-Driven Priorities and Programme Proliferation Diagnostics
- Strategy Cascade into Annual Operating Plans and OKRs
- Board Strategy Review Cadence and Strategic Performance Dashboard

Day 5: Case Work and the Strategic Plan Framework

- Humanitarian Charity Case Study: Rebalancing a Programme Portfolio
- Community Foundation Case Study: Strategy After the Loss of a Major Donor
- Strategic Plan Framework Drafting for an Own Organisation
- One-Page Strategy Summary for Board Approval
- Peer Challenge Panel and Strategy Defence

Skills You Will Gain

- Strategic Environment Analysis
- Programme Portfolio Management
- Theory of Change Design
- Funding Model Strategy
- Strategic Goal Setting
- Strategy Execution Oversight
- Scenario Planning
- Mission Alignment

Why Attend This Course

- Leave with a Strategic Plan Framework and a one-page summary ready for your board
- Decide which programmes to grow, sustain or exit on evidence rather than habit
- Protect the mission from donor-driven drift while keeping funding stable
- Test your strategic thinking against leaders of non-profits from other countries and sectors

Conclusion

A non-profit strategy is credible when it states what the organisation will stop doing as clearly as what it will pursue. This course moves from diagnosing mandates, environment and capacity, through the frameworks that link mission, impact and money, to formulation, risk and execution. The final day applies that material to non-profit cases and produces a Strategic Plan Framework and one-page summary that participants take to their boards as the basis of the next planning cycle.