**Title**

Strategic Planning for Nonprofit Organizations

**Length**

2 hours

**Level**

Basic

**Field of Study**

Tax

**Course Description**

Although a nonprofit organization may have admirable goals and dreams, many organizations do not achieve their potential and some fail completely. While the board of directors has the responsibility to lead the entity to success, many boards fail because the board lacks the knowledge, time, resources, or commitment that are needed to make an organization successful.

Many organizations wander aimlessly; they raise money, but never conduct meaningful programs. Other organizations seem themselves as winners, but the community and their clients perceive them as failures.

This course provides insight into the workings of a nonprofit organization. It will help the participant understand the organization’s need for a strategic plan. It will show the participant how to create a clear vision that is both measurable and achievable. Additionally it will explain how to prioritize goals and how to create actions or strategies that will enable the organization to meet its goals.

Major topics include:

* Why organizations fail
* Creating measurable standards to monitor actions and achievements
* Developing a nonprofit business plan
* SWOT Analysis – Strengths, Weaknesses, Opportunities, and Threats
* Creating a clearly defined exempt purpose
* Training board members to be leaders
* Importance and methods of establishing a meaningful budget
* Developing a marketing plan
* Techniques for making the IRS a partner rather than an adversary in establishing and sustaining the organization
* Creating a central organization/affiliate structure
* Reducing administration and fundraising expenses to increase the funds for program services
* Impact of state nonprofit tax regulation
* Avoiding unrelated business income tax

**Learning Objectives**

Upon successful completion of this course, participants will be able to:

* Recognize the importance of a board that is capable of achieving the organization’s goals
* Maximize program service expenses while reducing administration and fundraising expenses
* Create an effective marketing plan
* Avoid the unrelated business income tax
* Develop measurable standards to monitor the achievement of goals