



**Omaha
Community
Foundation**

Growing good,
together.

Developing a Strategic Plan for Growth

Featured Presenter:

Beth Morrisette, MPA, MSW

Parlay Consulting Firm

July 23, 2025

Introductions



Nathan Morgan
Donor Services Advisor



Dasia Horne
Sr. Program Manager



Our Mission and Vision

Mission

We maximize the power of philanthropy to strengthen our community.

Vision

A connected community of passionate philanthropists, strong nonprofits, and thriving residents.



**Omaha Community
Foundation**



What is a Community Foundation?

- 900+ community foundations nationwide
- Structure: 501(c)(3)
- National Standards Accreditation
- Giving tools
 - Charitable giving funds
 - Concierge level service
 - Community connections
 - Partner grantmaking

OCF's Impact

- **Serving**
 - Community, Nonprofits, Donors
- **2,000+** Donor Funds
- **\$240M** in grants processed in 2024
- **17,000+** grants to **3,200** nonprofits



Mission in Action

- **Strong Nonprofits**

OCF Serves as a capacity building resource to strengthen the vital community of nonprofits to support diversified funding streams and sustainability.

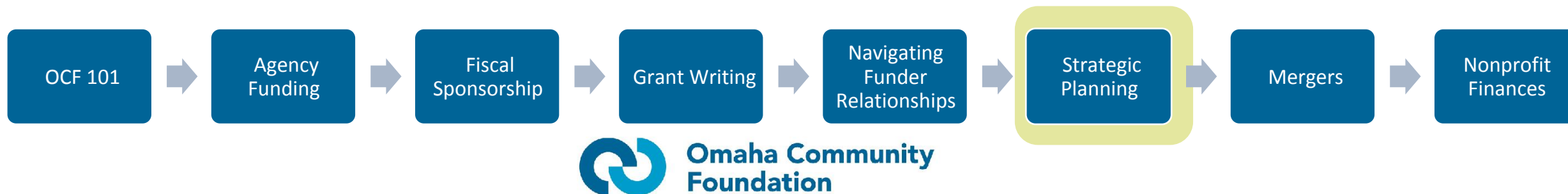
- **Upcoming Grants**

- **Building Healthy Futures:** July 1-August 1
- **Fund for Omaha:** July 1-August 1
- **Nonprofit Capacity Building Program:** Summer

Capacity Building Series

- **Building Resources**

Each session of the Nonprofit Success Series builds upon the content of the previous session. The goal is to equip nonprofits to thrive and meet their mission.



Featured Facilitator Introduction



Beth Morrisette, MPW, MSW

CEO

Parlay Consulting Firm



Welcome!

We Will...

- Understand the purpose and value of strategic planning
- Identify elements of a strong planning process
- Explore how strategy supports day-to-day operations
- Learn how to get started or improve your plan
- Discover local resources

Understand the purpose and value of strategic planning





**Strategy is about making choices,
trade-offs; it's about deliberately
choosing to be different.**

Michael Porter



Common Myths vs. Reality



Its not just a document – it’s a process & practice



Not a once “once every three years” activity – it must be adapted in real time.

Planning as a Leadership Discipline

- Aligns Mission, Operations, People & Resources



Identify elements of a strong planning process



“

**If you want to go fast, go alone. If
you want to go far, go together.**

African Proverb

”

Team Alignment



Communicate the “Why”

Co-create Goals

Cascade the Plan

Reinforce in Practice

Celebrate Aligned Wins

Explore how strategy supports day-to-day operations



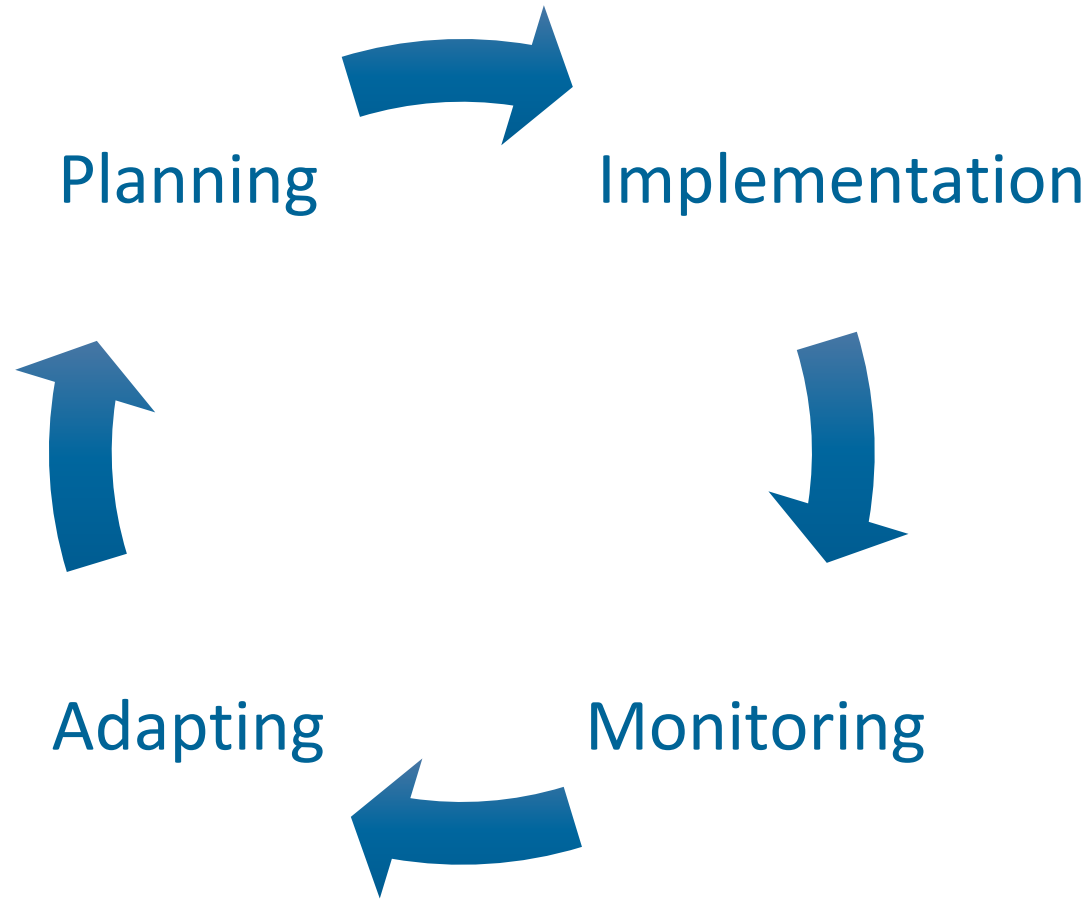
“

**However beautiful the strategy,
you should occasionally look at
the results.**

”

Winston Churchill

Lifecycle of a Strategic Plan



Pitfalls to Avoid

- No useful, informative stakeholder input
- Too many goals
- Plans that sit on the shelf



Learn how to get started or improve your plan



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Developing a Strategic Plan for Growth

“

**Start where you are. Use what
you have. Do what you can.**

Arthur Ashe

”

Starting from Scratch

- Clarity on Identity of organization
- Who will be involved. Why?
- What questions do we need answered before we begin strategic planning?
- What do we need to know about our environment/sector?

- Timeline – 3-6 months (on average) more engagement, more research – longer timeline

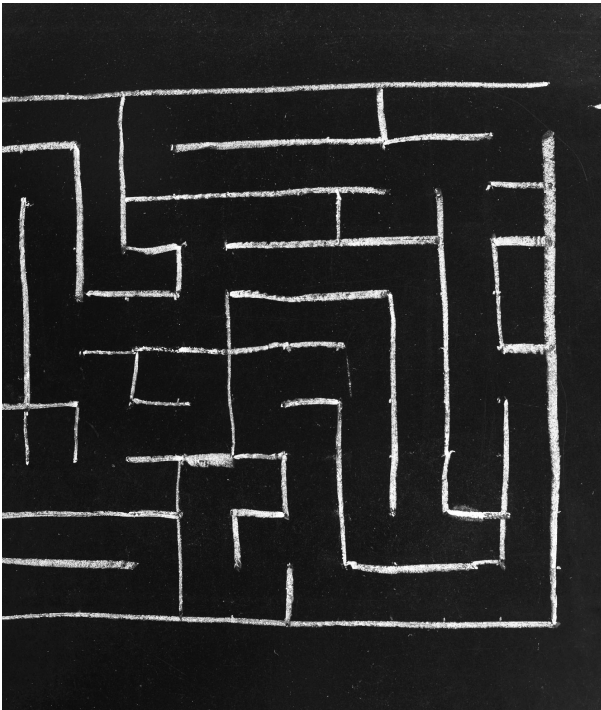
Strengthening an Existing Plan

- Recalibrate existing goals annually
- Do you have KPI's Identified?
 - Are you talking about them?
- Have you had new leadership join?
 - Do they see how they are a part of it?

Stakeholder Engagement Strategies

- What would your board say about your current strategic plan?
 - If you don't like the answer to that question, do something about it, silly!
- How is your team getting updates?
- Did you go back to the community or stakeholders you engaged to help inform the strategic plan?

Activities to support design



- Wave Method
- Dual Bottom-Line
- Interviews, focus groups, surveys, community forums
- Update Mission, Vision, Values
- Materials & Artifact Review

Activities - continued

- Clearly define your business model
- Clearly state and review your funding sources (include program income & expenses)
- Competitor Analysis
- Trend analysis
- Now update your future business model

Discover local resources



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**Alone we can do so little;
together we can do so much.**

Helen Keller

”

Where to find help

- Why a consultant?
- Where do you find a quality consultant?
- What resources have you been able to access or leverage?

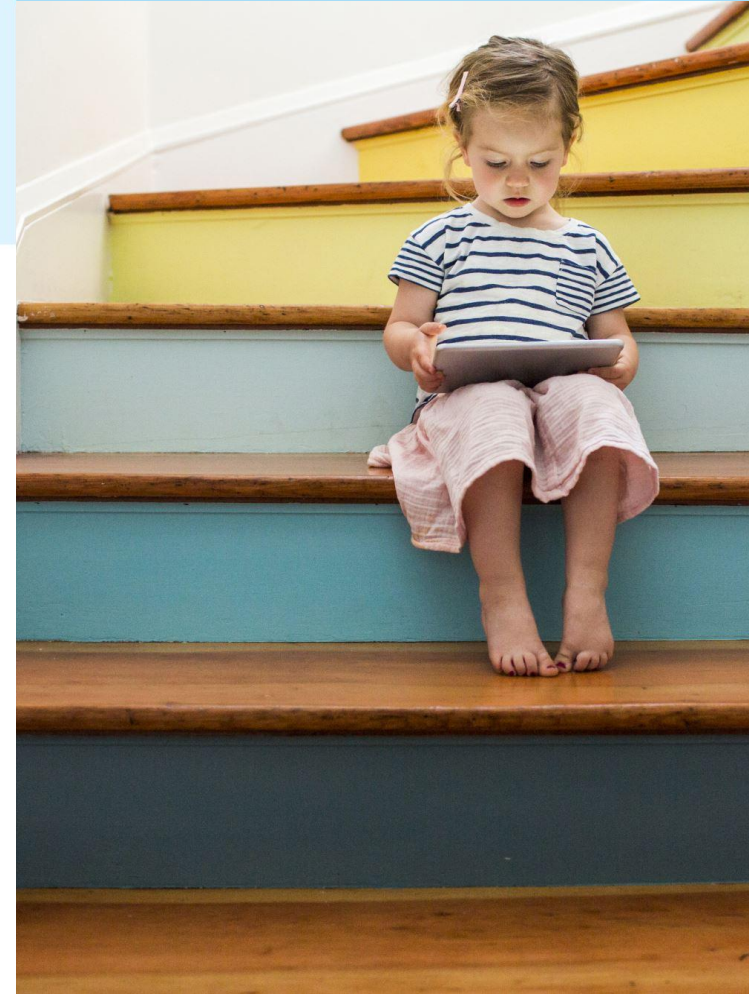


Now What?



Next Steps

- What part of your plan (or process) needs the most attention right now?
- Who else needs to be involved?
- Put your action step on your calendar today!



What are our Take Aways?



Questions





**Strategy & Capacity Building
Leadership & Change Management
Research & Evaluation**

Parlay Consulting Firm provides organizational development services based on your unique needs. Whether your business is nonprofit, publicly funded or private for-profit, we help you achieve your desired results.

parlayconsultingfirm.com

Thank you!

**Please Take 5 Minutes
to Complete a Brief Evaluation of the
Workshop**

Please Contact Us with Any Questions:

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