

# COMMUNITY RESOURCE EXCHANGE

## OUR STRATEGIC PLANNING SERVICES: BUILDING PARTNERSHIPS FOR SUCCESS

Community Resource Exchange (CRE) has a track record of providing state-of-the-art planning services to nonprofit organizations on the front lines of alleviating poverty and advancing social justice. Each year CRE provides strategic, operational, development, and program-planning services to more than one hundred nonprofits throughout NYC.

As a nonprofit itself, CRE is uniquely qualified to address the planning needs of others in the nonprofit sector. We know firsthand about the challenges of nonprofit management in the current environment. For over 29 years, we have provided impact-oriented planning services to hundreds of organizations in virtually every neighborhood and community in the five boroughs.

### Service Overview

CRE's planning services are designed to strengthen our clients' organization's ability to make informed decisions; align its vision, strategy, and resources; and fully engage its stakeholders. These services include:

- Top-to-bottom strategic planning to revisit or revise our clients' mission, vision, core services, and positioning to ensure alignment of staff, board, and other stakeholders.
- Operational planning to isolate and address key internal concerns and assess the current state of our Clients' operating systems and how well they serve the organization.
- Program planning to develop a new service or strengthen existing program.
- Fundraising planning to develop strategies for identifying and raising the resources needed to support the implementation of our clients' plans.

Organizations turn to CRE for planning when:

- An opportunity/need arises to address an emerging need among the agency's core constituency or to refine a current program in response to constituents' feedback.
- Some aspect of the organization's internal operating system interferes with the ability to make the most of the agency's programs and mission.
- A sea change in their field creates a need to reevaluate their way of doing business. Such changes may be due to the emergence of new research; or changes in governmental policy, funding environment, competitive environment, or within the agency's community.
- A transition in the organization's leadership presents an opportunity to revisit past assumptions and explore new directions.

### How the Planning Process Works

We start with a thorough assessment. By asking the right questions and thinking critically in tandem with our clients, CRE's consulting team develops a comprehensive picture of the organization, the environment it is operating in, its financial situation, and the critical issues that need to be addressed. We ask clarifying questions:

- *What is driving the interest in planning?*
- *Is the timing right for such a process?*

- *What are the critical issues currently facing the organization that planning might address?*
- *What is the desired end result of the planning effort?*
- *How much time does the organization have to engage in such an effort?*
- *Who should be part of the planning process?*
- *What information is needed to enable the organization to make favorable choices?*
- *Who will lead the change process that the planning will catalyze?*

Once these questions have been answered, we develop a customized work plan tailored to the organization's needs and circumstances. This written work proposal maps out our recommended approach and captures our understanding of the goals for the planning process and the key players to be involved. Once the client organization approves this proposal, we get to work, partnering with our client every step of the way.

Whatever type of planning is required, the hallmark of CRE's approach is to remain engaged through the development of action steps to carry out the plan (implementation planning) and to support the organization in thinking about how to finance the plan (fundraising strategy). This ensures that the plan becomes a living, breathing document that leads to meaningful changes—not just another report on the shelf.

### **Planning in Context**

Planning takes place in the midst of busy days, alongside many other competing priorities. That's why CRE works with our clients to make the planning process convenient and manageable. This includes evening and weekend services, if that's what our client's schedule requires.

### **Making the Right Match**

Along with outstanding facilitation and process-design skills, our talented staff members have strong backgrounds in many issue areas, including child welfare, youth development, immigrant affairs, HIV/AIDS prevention and services, housing, economic development and organizing. Where cultural competence is an issue for our clients, CRE's diverse and versatile staff members are able to respond. Our planning services are available in English and Spanish.

### **Engaging Stakeholders**

A planning process cannot get very far without the energetic cooperation of board, leadership, staff, and other stakeholders. With a quarter century of expertise in facilitating alignment among diverse stakeholders, CRE understands that bringing all appropriate players to the table is a prerequisite to attaining planning goals. We work with our clients to determine who should be included in the planning process and how best to involve them. CRE's skilled facilitation helps stakeholder groups get to the core issues by examining assumptions, exploring difficult or delicate questions, navigating disagreements, and working toward consensus and a unified vision. This in turn promotes buy-in and ensures a cadre of empowered and enthusiastic stakeholders who can provide the momentum needed to advance the planning agenda.

### **Maximizing Impact**

With CRE, helping organizations zero in on their goals and objectives is just the beginning. Increasingly, we structure planning processes with an eye to outcomes measurement, by laying the groundwork at the planning phase for measurement of effectiveness later in the process. Our planning services are results-oriented, helping our Clients' organizations to vigorously

address the internal and external issues that can stand in the way of maximizing an organization's mission. CRE is unique in helping clients move from ideas into implementation by offering tangible support with tactical issues like fundraising, leadership development, board development, marketing, communications, and technology issues.

**With over 30 years of experience, a steadfast commitment to client satisfaction and the know-how to get the job done right, CRE is both a leader and a pioneer in the delivery of cutting-edge planning services. Our impact-oriented approach transforms planning into practice, ensuring a rich and productive planning experience for our clients and the constituents they represent. That's the CRE way.**