

**Strategic Planning for Nonprofits Workshop  
Federal Reserve Bank of Richmond  
April 30, 2010**

**Agenda**

**8:00 a.m. Registration**

**8:30 a.m. Welcome Remarks**

Sally Green, First Vice President of the Federal Reserve Bank of Richmond

**Introductions**

Courtney Mailey, Community Development Manager, Federal Reserve Bank of Richmond

**8:45 a.m. Agenda Overview**

Moderator: Jim Hayes, Assistant Vice President, Corporate Planning, Federal Reserve Bank of Richmond

**9:00 a.m. Overview of Strategic Planning**

- Why engage in strategic planning
- Elements of a strategic plan
- Measuring the success
- Implementing the Strategic Plan

Nonprofit Perspective: Gail Harris, Senior Vice President, Strategic Marketing and Research, United Way of Greater Richmond and Petersburg

**10 a.m. Break**

**10:15 a.m. Mission, Vision and Goals**

Moderator: Jim Hayes

- The importance of a driving mission
- Defining the organizational vision
- Goals: How will you distinguish the organization?

Nonprofit Perspective: Todd McFarlane, Executive Director, Boys and Girls Club of Metro Richmond

Break-Out Exercise: Drafting relevant mission, vision and goal statements

**11:30 a.m. Break**

**11:45 a.m. Conducting the SWOT Analysis (Working Lunch)**

Moderators: Jim Hayes and Alex Swartz, Senior Analyst, Corporate Planning, Federal Reserve Bank of Richmond

- Conducting the Environmental Scan
- SWOT Analysis

Nonprofit Perspective: Leisha LaRiviere, President and CEO, Richmond Metropolitan Habitat for Humanity

Exercise: Environmental Scanning and SWOT analysis

**1:30 p.m. Break**

**1:45 p.m. Setting the Plan**

Moderator: Jim Hayes

- Characteristics of successful initiatives
- Mitigating threats, exploiting opportunities
- Prioritization/Resource reality check
- Identifying objectives
- Measuring success/SMART

**3:00 p.m. Panel Discussion: Lessons Learned from Local Nonprofits**

Moderator: Amanda Kelley, Special Assistant to First Vice President, Corporate Administration, Federal Reserve Bank of Richmond

- Jane Holliday Walker, Director of Community Partnerships, Robins Foundation
- Gail Harris, Senior Vice President of Strategic Marketing and Research, United Way of Greater Richmond and Petersburg
- Sarah Craig Freeman, Vice President of Development, Boys and Girls Club of Metro Richmond
- Leisha LaRiviere, President and CEO, Richmond Metropolitan Habitat for Humanity

**4:00 p.m. Closing Remarks**

Kimberly Zeuli, Assistant Vice President and Community Affairs Officer, Federal Reserve Bank of Richmond

**4:15 p.m. Adjourn to networking reception**