

## Strategic Planning Process Overview

---

### Introduction

This provides an overview of our approach to strategic planning. All our work is highly customized to meet the unique needs and budget of each organization. We are flexible to include components that will enhance implementation, such as a communications plan, a fundraising strategy or a board development strategy. We work with staff and board to determine the most useful agenda.

### Purpose

Typically, the purpose of a strategic planning process is to make deliberate decisions for the future of the organization, to set specific measurable goals and to align operational plans, including marketing and fundraising efforts, with strategic priorities. The process and resulting products are important tools for focusing the direction and energies of an organization.

The result of the process is a practical, realistic, “user-friendly” document that assures precious resources (dollars and people) are maximized to achieve goals. The planning *process*, however, is as important as the final document. An effective and well-managed process can also be a significant team building, board development and public relations tool.

### Process

A strategic planning process should be expedient and time-framed. With an information-gathering phase and a commitment from process participants, strategic planning can be completed in an eight to twelve hour decision-making session. Given the typical urgency and importance of nonprofit work, the process works best when relevant information is brought to the table, the organization’s leadership develops strategies and leadership commits to an ambitious action plan.

Strategic planning also must be “market driven” – that is, an organization’s strategic priorities must be driven by the community in which it operates. Depending on the organization’s existing knowledge of its potential members, donors or volunteers, we recommend market research prior to the decision-making session.

## **Process Components**

### ***Situation Analysis***

The purpose of this phase is to collect and analyze internal, external and market information and to assess issues that may be opportunities or obstacles in plan implementation. It might include:

- an organizational assessment or environmental scan;
- interviews with staff and board leaders;
- focus groups or phone interviews with potential members, volunteers or donors;
- review of organizational materials such as by-laws, past plans, marketing materials and products; and
- secondary and statistical or data research or competitive analysis.

### ***Strategic Decision-making***

This is proposed as an eight-hour session to address strategic issues and make deliberate choices, based on context. The result of this process is a strategic plan outline defining, mission, vision, position, goals and objectives. This session is typically with the entire board and staff, and may include other interested parties. Another half day can be added to organize for success, which often includes board development, organizational development or transition strategies to best implement the strategic plan.

### ***Plan and Recommendations***

The strategic planning process provides the organization with a specific product rather than simply raw data. We prepare a strategic plan document that can be used immediately for implementation and for distribution to donors and constituents. Most often, the group walks out of the session with a complete strategic plan outline. Final products include an executive summary, a detailed plan outline highlighting key components, and specific tasks and timelines for implementation.

### ***Deliverables***

Upon completion of the process, specific deliverables should include:

- 1) transcripts of the strategic planning process;
- 2) a situation analysis summary;
- 3) a strategic plan Executive Summary;
- 4) a strategic plan in bulleted, outline form for easy use and application; and
- 5) written recommendations for implementation including tasks and timelines.

## Sample Planning Retreat Agenda

- Introduction and Overview
  - Introductions, expectations and purpose
  
- Situation Analysis
  - Priorities and needs assessment
  - “Market” and community assessment
  - Environmental scanning and trends
  - Organizational analysis and issues
  
- Strategic Issues
  - Core issues necessary for decisions and successful implementation
  
- Planning
  - Vision, values and mission
  - Imperatives
  - Goals and objectives
  
- Operational Issues
  - Staffing, systems, structure, skills to achieve goals
  - Communications, marketing, fundraising strategies
  - Decision making and priority setting
  
- Board Roles and Responsibilities