

STRATEGIC PLANNING

Strategic Planning is a management tool, a proactive problem solving process, and a vehicle for direction finding for organizations in relation to the environment. It attempts to position organizations for their best future. Every organization is unique and the process and outcomes will vary, but here is a general outline of what's involved.

1. DETERMINE READINESS

- understand the nature of planning
- decide whether this is the right time or the right tool
- complete benefits/concerns analysis

2. PLAN TO PLAN

- get commitment, create climate supportive of strategic planning
- outline a planning process that fits organizational culture
- determine if outside help is necessary*
- form a planning team (who will chair? composition of committee?)
- determine how stakeholders will be involved – surveys, focus groups, etc.
- outline history and present status

3. SHARE THE PASSION

- develop/clarify mission
- develop/clarify shared values and vision

4. ASSESS THE ENVIRONMENT

- conduct internal analysis – strengths and weaknesses
- conduct external analysis – threats and opportunities
- identify critical/strategic issues

5. CHART THE FUTURE

- establish strategic goals based on vision and critical issues
- identify strategies and outcomes
- develop action plans and budgets

6. COMMIT TO PAPER

- agree on a format
- develop a first draft
- review draft
- prepare final plan

7. TAKE ACTION

- board adopts/authorizes plan
- establish priorities within the plan

- establish a standing committee to oversee implementation
- implement plan by integrating into board and staff work plans
- monitor and evaluate plan and make necessary adjustments
- celebrate!

* See our paper on Working With a Consultant

If you want to do-it-yourself some helpful publications include:

- ✍ Strategic Planning Workbook for Nonprofit Organizations
by Bryan Barry/Wilder Publishing Center
 - ✍ Field Guide to Nonprofit Strategic Planning and Facilitation,
By Carter McNamara, MBA, Ph.D., Authenticity Consulting, LLC
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If you would like Pat to work with your organization on the strategic planning process, contact her today.