

Has your organization had a strategic plan in the past, and now it is time to embark on the process again? Maybe you have a strategic plan, but it needs to be dusted off, or perhaps you need to do a better job measuring progress. Your organization may not be working from a strategic plan, and you wish you knew where to start.

Planning alone does not produce results; implementation is a key factor. However, a well-developed strategic plan helps an organization focus on priorities as its teams work together toward a common goal.

Before embarking on a strategic planning process, an organization should spend some time preparing. Use these questions that we have developed based on “Strategic Planning for Nonprofit Organizations, A Practical Guide for Dynamic Times”, by Michael Allison and Kude Kaye. We have also created a checklist through our strategic planning experience to help guide your planning process.

Use these questions and our checklist to help guide your strategic planning process.

1. What does success look like at the end of the process?

Examples:

- For both board members and staff to be able to identify and then articulate the key priority areas of our organization.
- A roadmap for expanding our geographic footprint.
- A tool for messaging our plan to funders and other community partners.
- A revised mission and vision for the organization.

2. What are the strategic questions we want to address?

Examples:

- How do we better serve the needs of children with multiple disabilities who come from all over Bexar County?
- Do we want to grow the program or continue the same programs we are currently delivering?
- What does a succession plan for both staff and board look like for our organization?

3. Are there operational issues that need to be addressed before planning begins?

Examples:

- There is a leadership transition that is or needs to occur.
- The board needs a better understanding of the organization’s finances.

4. Are there any non-negotiables that need to be articulated up front?

Examples:

- We will continue to offer our services at no charge to our children and families.
- We will not change the population we are currently serving.

5. What issues (politically, environmentally, or culturally) could impact the planning process?

Examples:

- There is a major election in the middle of our process.

Strategic Planning Checklist

- Present strategic planning process to the board and secure commitment for their support, their creativity, and willingness to look at new ways of doing things, and their active participation.
- Discuss with the board your mission, vision, and values – determine if time will be spent on revising or re-writing any or all of those.
- Decide if you will bring in an outside consultant. If not, identify who will lead the process and who will write the final document.
- Define and share roles and expectations for all participants in the planning process (complete a project matrix that defines each stakeholder's role and determines the final decision maker).
- Identify and recruit a planning committee to help guide the process (board and staff).
- Decide what data needs to be gathered to assist with your organizational scan and collect it.
- Define how board members and staff will be updated during the planning process.
- Set aside financial resources for the planning process (especially if bringing in an outside consultant).
- Take care of any operational issues that need to be addressed prior to the process.
- Recruit and hire outside consultant, if appropriate.
- Define engagement of internal and external stakeholders.
- Decide what the final deliverable(s) will include (written report, board presentation, funder/donor report, etc.).
- Set a date for the planning retreat or sessions that will be held, if applicable.
- Establish a project timeline for the planning process by working backwards from the date the plan needs to be completed.
- Work the timeline and embrace the planning journey!

REMINDER! Add in components for regularly assessing your progress toward the plan, involve the board in benchmarking, and ensure there you are linking your organization's operating plan to the overall strategic plan.

Need guidance? Drop us a note at hola@cielostrategy.com.