# Planning to Plan

# excerpt from The Planning Toolkit by Sage Solutions and Hopa Mountain

## What is a strategic plan?

Strategic planning is long-term, big-picture thinking that creates a roadmap for a successful, proactive future. This planning process is a point in time for the board of directors to give input and set direction for the organization. True planning is a spiral progression that focuses on continuous improvement; it is a building and growth process that when done correctly energizes and engages the board and other constituents.

## How often should strategic planning be done?

Planning is an ongoing process that happens every year and is reviewed and modified regularly. Strategic planning refers to longer-term planning, typically for periods of three-five years. Annual planning is just that, done each year to review the strategic plan, modify as needed, and identify annual objectives for the upcoming year.

## Who organizes planning?

In the shared leadership role of boards and executive directors, it often falls to the executive director to get the strategic planning process organized. Planning should be a priority activity with time allocated to move through the process and engage all stakeholders. In addition to allocation of time, financial resources should be budgeted for the planning process.

## When to plan?

Planning is an annual event. We recommend that planning starts about four months before the end of your fiscal year. That way your plan expenses can be integrated into your annual budget and fundraising plan.

*Timeline for regularly reoccurring board planning activities*

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| **Action Item** | **Timeline** |
| Strategic and Operational Planning | Started approximately four months before the end of fiscal year. |
| Strategic and Operational Plan approval by board | When annual budget is approve, at least one month before beginning of fiscal year. |
| Work plan development for board, staff, volunteers, committees, and task forces | Annually at the beginning of fiscal year.Not a board responsibility EXCEPT for board related goals.  |
| Annual assessment of performance for board per the operational plan, staff, volunteers, committees and task forces | Annually at the beginning of fiscal year during the goal setting meeting.Not a board responsibility EXCEPT for board related goals. |

## Who is included in planning?

For strategic planning to be effective an organization needs input from all its stakeholders; clients, partners, board members, staff, management, volunteers, donors and other individuals impacted by the organizations work. This can be done in a variety of time and cost effective ways including surveys, focus groups, telephone calls, or interviews.

## Dollars well-spent, hire a facilitator!

One thing is for sure, a professional planning facilitator will help an organization make the best use of its strategic planning process. A facilitator will provide objectivity, can ask tough questions, and makes sure everyone is heard. When hiring a facilitator, be certain he/she understands nonprofits and strategic planning; this is an investment future and will repay many times over.