

How to do Strategic Planning

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This overview shares the main steps to consider when thinking about doing strategic planning. It will be important that the board is on-board for the planning process. This overview suggests ideas for how to do the planning. You will adapt it to the needs that you and the board see as most important and to ensure that what you get is what you need to take your organization forward.

Understand the situation and why planning is important to do now. Has your organization grown a lot recently and taken on new projects or campaigns? Has growth or loss of key leaders or funding changed so many aspects of the organization that now is a good time to step back and plan for the next three years in a new way? Are you facing some big questions such as how to best lead a coalition effort on an important issue, or address a pressing problem in your community? Is your role shifting – for example: how activist should we be or do we want to take a more community-building stance? There may also be also significant organizational issues around fundraising, staffing and program development.

A good planning process can help the organization's leadership agree on a good way to address these and other issues, and set goals and plans to accomplish them. Strategic planning also will create a review process to periodically check in, evaluate how things are going, and adapt.

Here's one way to think about the steps in the planning process:

1. Plan to plan: Agree on the scope, timing, budget and process for your plan.

Decide who should be involved and how. The staff and /or board can lead the planning process and both will be involved. Doing a plan will build common knowledge and commitment to the work ahead. The board will make the final decisions on the plan and approve it and the related budget, so they must participate. Are there other advisors or coalition members who should also be involved – or consulted on specific aspects? Are there community people who you would like to listen to better understand how your organization is seen now, and their hopes for the community's future? The important point is that doing a plan is a way to strengthen relationships inside your organization and your position in the community.

Set up a sound process for planning. Usually this includes some research and fact finding – such as interviews and staff and board, key other leaders, funders, or maybe a few community meetings or discussion sessions with a few smaller groups. Timing is another issue. When do you want to have the plan done by? How long of a process do you want – what is the tolerance level of the board for this kind of a process? Many groups just do a few interviews and hold a board planning session of a day or two. Others want to take more time and go deeper, as the group has significant program issues or organizational options to explore and develop. These activities all take time and money – that may otherwise be better spent on doing the work! The board and staff need to find a good balance between planning and doing!

Find and hire a good facilitator. It helps to have a skilled neutral party who can lead this process and facilitate the discussions. Its worth the money. Create a planning committee of 3-4 staff and board to work with facilitator.

2. Planning: Do the research and design and hold a retreat. Decide on major goals and activities for next three years.

The research process can take a few weeks or longer. The retreat can be as short as a day if there is a high level of congruence on big decisions among the staff and board members. Most boards find it better to have retreat for at least a day and a half so all the big questions get raised in the first day and can be resolved after a night to sleep on them. Sometimes a group will do two meetings, separated by a few weeks or so.

The retreat will generate a draft plan with a lot of the big decisions made. It will include an annual plan for the next year (including who will do what by when) and bigger picture goals and outcomes for three years. Following the retreat, this plan gets written up (keep it short!). It usually takes additional work to flesh out all the details and decisions. A budget is created to match this plan. In the process of reconciling the anticipated work with the budget, staff and volunteer time, plans may get reprioritized. The plan needs to be realistic as well as inspired by passion to make a difference. It also will have a monitoring process for tracking progress and an annual review process to learn from your experiences and renew your plans.

3. Then go do it!

I hope this helps you and your board think through what makes sense for your organization. May your visions come true.