

Strategic Planning

A **strategic plan** is the product of your organization's ongoing planning, implementation, and monitoring process. The strategic planning process identifies emerging organizational goals and objectives and delineates an action plan for their achievement.

While the board of directors is most directly involved in this process, staff, volunteers, and program participants should be encouraged to contribute their ideas about the organization's future direction. The process is usually facilitated by an objective third party consultant who can identify and clarify issues, lead the group toward consensus, and prepare a final, written plan. The planning process can take several months and the final plan sets direction for the next three to five years.

The steps of the strategic planning process are:

- 1. Recommit to your vision and mission statements.** Because all of your organization's activities revolve around your vision and mission, it is important to analyze their relevance and rewrite them if necessary before going any further.
- 2. Conduct a situational analysis (AKA 'SWOT Analysis').** Identify your organization's strengths and weaknesses and environmental opportunities and threats. This analysis should be performed on all areas of operations: finances, human resources, programs, fundraising, etc. This process will help you find ways to build on your strengths, remedy your weaknesses, take advantage of opportunities, and minimize threats.
- 3. Set goals and objectives.** Goals and objectives should be set for each area of operations. They should evolve out of your vision and mission and respond to the findings of your situational analysis.
- 4. Break it down into tasks.** Assign each task to a specific individual, determine how much it will cost, and the timeframe in which it must be done.
- 5. Organize the information.** List each person's responsibilities. Make a calendar that shows what will happen when. Add up the costs for each operational area. Put your goals and objectives into writing and make sure that everyone who has a hand in that process is aware of, and has a deep understanding of, the goals, objectives, and action plan.
- 6. Implement the plan.** Put your plan into action. Supervise the process by minding the calendar, staff and volunteer actions, and budget.
- 7. Monitor the results.** Whether a goal is met or not, analyze and assess the outcome. Determine whether the result is a product of a strength, weakness, opportunity, or threat. Apply what you learn to planning and implementing in the future.
- 8. Revise the plan if needed.** If the external environment presents an unexpected situation or the internal environment evolves in an unpredicted way, adjust your goals, objectives, and plan of action appropriately.
- 9. Start over again.** One year to six months before the end of your existing plan, it's time to get ready to plan again.