

8 STRATEGIC PLANNING TIPS

By Sara Wilson

What do you see at the end of your telescope? What distant objects appear nearer, what lenses are you using and what objects are magnified? My philosophy is that planning is part process and part product; both are important. Here are eight tips on strategic planning that I've developed over the years of designing and facilitating planning processes.

Tip: You can't plan for the future if your organization is in a mess. We know organizations are messy, but I am talking about major problems, division and dysfunctional issues. Your time and the organization will be best served by focusing on addressing those major problems. No one can plan for the future when the house is on fire.

Tip: Engage the board and staff in planning. The executive who makes plans without inviting input is the one who others think is "at fault" when things don't come to fruition.

Tip: Consider gathering the input of volunteers, partners, key donors. Organizations who only "navel gaze" miss a variety of opportunities including different perspectives, new ideas and engagement.

Tip: Short-term and long-term planning both have merit. Doing both will serve the organization best.

Tip: Don't create a plan if you aren't going to use it. It will be a waste of your time, your staff's time, your board's time and anyone else involved.

Tip: A plan will serve as a roadmap. It won't give you all the answers and you may have to change your course along the way. That's ok.

Tip: Integrate your plan into the daily activities order to keep it alive.

Tip: Evaluate progress toward strategic goals at a frequency that will keep you from getting lost or going down rabbit holes. You check for landmarks when we travel, right? Do the same with your strategic plan to ensure you aren't off course or to determine if you need make an adjustment.

Do you need help knowing what kind of planning/planning process is best for your organization? Give us a call for a complimentary consultation. MWA team members do strategic, annual, succession, fund development and budget planning for organizations. We are talented and enthusiastic about nonprofits. We can help.