

Strategic Planning

Strategic planning is the process of establishing the organization’s vision and goals, evaluating current programs and services, and measuring mission impact. Strategic planning answers questions such as, “What should we do?”, “How shall we do it?” and “How will we measure our impact?” Ideally, the board should engage in strategic planning every three years and measure progress annually. Annual goals should be based on the strategic plan, taking external and internal changes into consideration.

Strategic planning has many benefits—it helps an organization achieve its mission more effectively; focuses financial and human resources on specific agreed-upon goals; and establishes benchmarks to measure the impact of the organization’s programs and services.

Before initiating strategic planning, the board must gauge the organization’s current situation and its readiness to plan. An organization should not undertake strategic planning in the midst of a financial crisis, during a time of considerable board or staff turnover, or, for instance, if the office has just burned down. Crisis situations demand short-term plans to address immediate needs.

Before committing to Strategic Planning the board must allocate necessary time and resources, specifically:

- Develop an ad-hoc committee of board directors, volunteers and staff to manage the planning process and ensure its completion and implementation
- Budget financial resources for a planning retreat and for hiring a consultant to facilitate the process
- Schedule time for the planning retreat, discussion and implementation
- Allocate staff time for gathering information, participating in the process and handling administrative details
- Commit to using the plan for guiding future activities and annually evaluating the organization’s progress toward its strategic goals.

Strategic planning is just one type of plan an organization needs to guide its work. An annual plan should be developed before each fiscal year, with specific goals and objectives for the board, board committees and staff, along with a corresponding budget outlining expense and income. Fundraising, program and other near-term plans should be developed cooperatively by the staff and committees in light of strategic plan goals.



MAYES | WILSON & ASSOCIATES, LLC

www.mayeswilsonassociates.com