

Strategic Planning with Effectability, LLC

Strategic planning is much more than a once-a-year event yielding a document that sits on a shelf. It is an ongoing process that shapes and guides the fundamental decisions and ongoing actions of an organization. To compete in today's quickly changing environment, non- and for-profit organizations should examine their strategic planning processes and take a hard look at how prepared they are to face future challenges to sustain their mission and achieve their vision. The benefits of creating and implementing a good strategic planning process are:

- Discussions around issues and current business challenges are focused and efficient.
- Resources (time, people and money) are allocated to priorities that most closely impact organization goals and results.
- Priorities and expected results are clearly understood among staff, leadership and board members, reducing conflict, frustration and re-work.
- Decisions are rational and risks, benefits and trade offs can clearly be evaluated through the lens of the plan.
- Stakeholders are engaged and supportive of key initiatives.
- Long term priorities and weighed against short term gains.
- Employees are engaged because they understand and can see the impact of their daily work on organization results.

Why embark on a strategic planning process?

When considering embarking on a strategic planning process, several questions are top of mind for board members and organizational leadership: What should the process entail? Who should facilitate the process? How much time will it take? What outcomes should we expect from the process? How will we make sure we actually adhere to and implement the plan? And, what investment should we make in the process?

Implementing an efficient, effective and customized process that reaffirms the organization's importance and generates commitment of stakeholders is critical. Also, objectively identifying the organization's strengths and weaknesses and taking stock of the environment the organization operates in are essential elements of the process. Desired outcomes of a strategic planning process are:

- An outline of the specific actions the organization should pursue in the future.
- New ideas for improving organizational performance.
- A better understanding of how the organization should allocate its time and resources.
- Clarity around an organization's ability to communicate its value to potential partners, service recipients and funders.
- A greater degree of confidence in the organization's ability to fulfill its mission, now and in the future.
- A deeper camaraderie and greater interaction among stakeholders of the organization.

What should the process entail?

Using an experienced external facilitator rather than a board member or stakeholder is an advantage for organizations. External facilitators focus on creating, executing and continually adapting the process. They organize and facilitate meetings, conduct research, produce the final report and make final recommendations to the organization. They provide balanced, dedicated and thoughtful leadership throughout the process and maintain a neutral perspective. A good external consultant also knows the

process doesn't end with the delivery of the plan; they consider ongoing follow-up work part of the process.

Regarding the time commitment, an obvious goal is to most effectively use board member and other stakeholders' time. Their commitment is required prior to the planning event to provide background information, during the planning event itself and for ongoing maintenance and execution check-in after the event.

The expected outcome of the planning event should be discussed with the facilitator and should meet the needs of the organization, not the facilitator. The outcome should include a realistic action plan to achieve the stated goals and measures. It should also include a plan for periodic follow-up and maintenance. Prior to beginning the process, it is important for board members and organizational leadership to discuss how they intend to use the plan and ensure implementation. Determining how to hold people accountable for executing the plan is critical

Effectability's Strategic Planning Roadmap

We've defined a flexible, effective and affordable approach to strategic planning, outlined below. Contact us today to discuss how this can be adapted to your needs, timeframe and budget.

Step	Inputs	Who involved?	Some questions this step addresses	Outcome
1. Analyze stakeholders	A list of current and potential stakeholders	Representatives from staff, the board, volunteers, service recipients, current and potential funders, current and potential partners, and community leaders	What does the stakeholder expect from the organization? What are the organization's greatest strengths/weaknesses? What are some of the best ways the organization can help our community? What are some gaps in the organization's service? What are other organizations similar to ours doing better or worse?	A description of the stakeholder groups, their characteristics and how well their needs are being served.
2. Create a mission statement or confirm an existing one.	Stakeholder feedback, competitive data, community statistics	Planning team	What is our purpose? What impact do we want to make in the community?	A clear, concise one to three sentence mission statement.
3. Create a vision statement or	Mission statement, stakeholder	Planning team	What difference do we want to see in three-five years? Where do we want to be in the future?	A clear, concise one to three sentence vision

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<i>confirm an existing one.</i>	feedback			statement.
4. Create a values statement or confirm an existing one.	Mission and vision statements	Planning team	What values will guide us as we work toward our mission and vision? What values are most relevant in carrying out our work? How will we reflect those values in our work?	Four to six values the organization believes are most important to fulfil the mission.
5. Perform an environmental scan.	Stakeholder feedback, industry research	Planning team	What trends will affect our business in the future? What is our competition doing? What best practices or innovations exist in our field? What opportunities for collaboration exist?	A summary of the environment in which our organization operates.
6. Perform an analysis of strengths, weaknesses, opportunities and threats	Environmental scan information, stakeholder data	Planning team	What do we do well? What needs to improve? What external developments may strengthen our organization in the future? What external developments may weaken our organization in the future?	An analysis to help distinguish our organization from others' to sustain our niche.
7. Analyze the budget	Organizational budget information, trends in the budget, project expenses and size. Budget projections based on current trends	Planning team	What are some trends in our financial management and budgeting? What revenue sources can be increased? What revenue sources are decreasing?	An understanding of current financial state.
8. Determine organizational goals/priorities.	Mission and vision statements, financial information, SWOT information	Planning team	What is our "edge"? Where will we focus our limited resources? How will we know we are successful?	Three to five long term goals.
9. Determine specific objectives for each goal.	Organizational goals	Planning team	What are the short term objectives that will move the organization towards each goal?	Three to five objectives for each goal.
10. Create an	Organizational	Planning	What specific tasks need to be	Tactics to

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<i>action plan.</i>	goals and objectives	team	done in year one and two to accomplish the stated objectives? What work will we say “yes” to; what will we say “no” to?	accomplish the objectives including timeline, responsible parties and costs.
11. Gather stakeholder feedback.	Mission, vision and values statements, SWOT, goals/priorities	Planning team, other board members and stakeholders	What did we miss? What needs further discussion?	Feedback from stakeholders to guide the process.
12. Finalize and approve the plan	Strategic plan document	Board members	How will we hold each other accountable for the objectives? How will we monitor the strategic plan implementation? What did we learn during this process? What will be different next time?	A final, approved plan.
Regularly review the action plan, confirm progress and adjust	Action plan, financial data, program data, other measures	Board members, executive director	Based on our measures, are we on track to achieve our goals or priorities? What adjustments need to be made? What needs to be reprioritized?	An updated action plan.