



Strategic Planning: The First Five Steps

FACT: One of the most basic responsibilities of a governing board is to secure the future of the organization through the creation and implementation of a current and relevant strategic plan.

Use the Q & A exercise below to determine your board's strategic planning readiness!

1. Has your organization ever completed a strategic plan?

- ☐ If YES, respond to the following questions:
 - a. When was it completed?
 - b. When does/did it expire?
 - c. Who facilitated the process?
 - d. Who participated in the process?
 - e. Was the plan successful?
 - f. If the goals/objectives were not met, why not?
- ☐ If NO, why not?

2. Do you have a current vision and mission statement?

- ☐ If YES, take time to complete review, update, and approve those before beginning the strategic planning process!
- ☐ If NO, schedule a visioning session with your board, staff, and select stakeholders to clarify these two key pieces of messaging.

Remember:

- a. Vision statements are designed to INSPIRE the community by sharing where you are going.
- b. Mission statements are designed to INFORM the community about how you are getting there.
- c. Only the board is authorized to approve the organization's vision and mission statement!

3. Does your board have big dreams for the organization's future?

- ☐ If YES, it is time to develop a plan so those dreams can become a reality!
- ☐ If NO, it is time to schedule intentional conversations to inform, inspire, and mobilize the board.

4. Do you have key benchmark data?

- ☐ If YES, determine which metrics should be considered for future planning and share those with the full team.
- ☐ If NO, work with the organization's board/staff to determine which information is relevant and needs to be compiled (via program records, anecdotal, etc.) so strategic planning participants are building on the same reality.

5. Do you have "buy-in" from your board and staff?

"Buy-in" refers to your board's willingness to dedicate significant time to actively participate in the strategic planning process. (Two full days is a reasonable expectation)

- ☐ If the answer is YES, it is time to select a facilitator, confirm the strategic planning workshop days with your board, key staff members, and stakeholders.
- ☐ If the answer is NO, determine what barriers are preventing the board from completing one of their key governance functions.
 - a. Do they understand their board role includes "direction planning" (aka: strategic planning)
 - b. Do they feel "unqualified" to lead the process and defer their responsibility to staff?
 - c. Is the time commitment to complete the process a barrier?
 - d. Is the projected cost for facilitation/completion of the plan a barrier?
 - e. What does the board need (education, inspiration, leadership) to reach a consensus and move forward with the planning process?