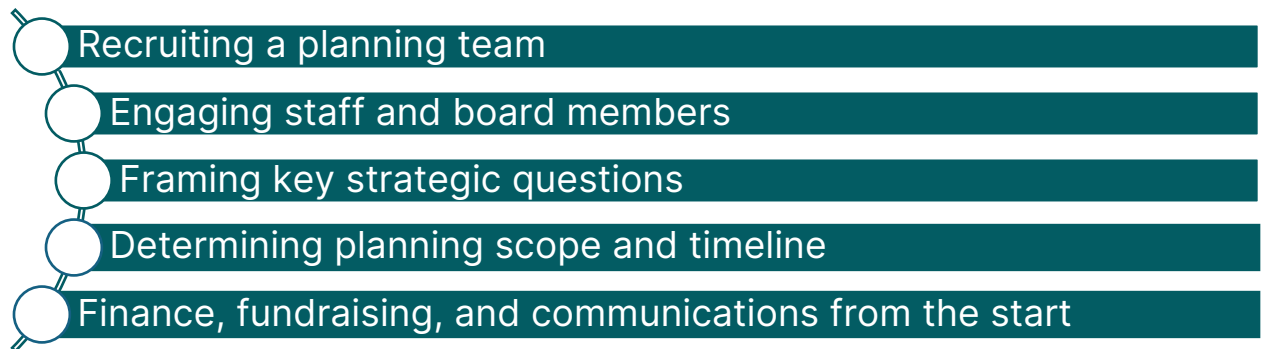


Getting Started with Your Strategic Planning



Recruiting a planning team

It's a good idea to recruit a small team to help design, guide, and complete your planning work. It should include the board chair and the executive director, or at least their designees. Board chairs often delegate this responsibility; executive directors rarely do. If they do, they will still need to follow the group's work closely, weigh in on key questions, and be able to update others in the organization regularly on the group's work.

The planning team should consist of a mix of board and staff members. This team will have the responsibility of bringing ideas and perspectives from the staff and board to the table, and of keeping the full staff and board informed and engaged as the process unfolds.

The team should be prepared to work. With a planning process that will last 4-6 months, the team should plan to meet every couple of weeks for 60-90 minutes. It's good to schedule all the meetings of this group well in advance. Team leaders should prepare well for each meeting and circulate an agenda one or two days in advance. They should also ensure that good notes are taken and circulated as soon as possible to all team members.

Between meetings, additional work will be necessary. This may include background reading, research, interviews with people inside or outside the organization, drafting elements of the plan, and more. All this will probably add up to at least 10 hours per month for team leaders and at least 5 for other team members. This level of commitment should be made clear to potential team members up front.

Engaging staff and board members

One of the planning team's first orders of business should be deciding how to engage the rest of the organization. The sooner the entire organization is interested, the better. Opportunities for meaningful participation in the early, middle, and late stages of a strategic planning process tease out different points of view and surface good ideas. They also create ownership of the process and buy-in to decisions that emerge at the end.

If the size of the board and staff members is relatively small and can gather in person soon, a good full-group discussion can be an excellent first step. The planning team should determine in advance the best questions to pose to the full group. Aim to ask a small number of big, thought-provoking questions such as:

- What do you think are the most important lessons we should learn from our work under our last strategic plan?
- What important external factors affecting our work have changed significantly in the last few years? What new opportunities or challenges have they created for us?
- What are our organization's limiting factors at this point?
- What are the most important questions we should consider carefully and then answer in this planning process?

Tips for Small Group Discussions

- Have someone facilitate the discussion
- Limit the number of questions – keep it short, this will help give everyone a chance to weigh in on each one
- Provide a few minutes of silence after each question for people to frame and jot down their initial thoughts before the discussion begins
- Request that all listen intently to understand others' points of view, ideas, questions, and concerns
- Encourage brief comments, to provide enough time to hear from everyone who wishes to speak.
- Don't force consensus; however, do note where opinions converge and diverge
- Capture the conversation in good notes – they will be the foundation for the planning team's next steps

Often groups are too large, too far-flung geographically, or too challenging to convene early in a planning process for such a full-group discussion. In that case, consider a series of facilitated discussions of questions like those above in smaller groups, in person if possible. If in-person meetings are not feasible, consider small- group meetings by telephone or video conference.

Other good options for early engagement include surveys and phone interviews. Any of these techniques may also be employed at later stages in the process.

The important thing is to engage the staff entire staff and board meaningfully and sooner rather than later, using whatever combination of techniques makes the best sense for your group.

Framing key strategic questions

With the preliminary work, research, and board and staff discussions in motion, the planning team can focus on developing a small number of key strategic questions (KSQs). These *KSQs* will help drive the entire remaining planning process. They should reflect the biggest, most important, genuinely strategic questions that your group should now explore deliberately and thoughtfully.

Your KSQs should be questions whose answers will significantly affect the organization's trajectory and long-term results.

Key Strategic Questions Criteria:

- Are timely, deserving serious consideration in the current planning process
- Are manageable in scope (as opposed to being overwhelming in number or type)
- Can lead to decisions within the next few months – decisions that will generate clarity and momentum for your group going forward

Every question on your list should meet **all** of the criteria above. Critically thinking as you distill and refine your list will help ensure a productive process and meaningful outcomes.

Avoid too-general questions with perennially contextual answers, such as, "Should we be more aggressive or more collaborative?" Also avoid very short-term questions such as, "How should we organize this year's fundraising event?" Finally, avoid unanswerable questions such as, "What is our ultimate potential for membership growth?"

Your final list of key strategic questions might be as few as three or as many as ten. Of course, the longer your list, the less time and energy you will be able to devote to each question. Err on the short side.

Your questions should generate thought, good discussion, and momentum. Clear, focused questions lead to focused, productive discussions, and good decision-making.

Your work to frame your key strategic questions is among the most important you will do. Give it your best effort. Consider getting feedback from the full group about your list. But don't delay. Now that your process is underway, it's important to maintain momentum.

Determining planning scope and timeline

With key strategic questions framed, it is a good time to determine the scope and timeline of your process. You probably had a general idea about this from the start. However, the nature of your key strategic questions may cause you to rethink scope and timeline now.

Perhaps your early work has helped you see that the organization is closer to being on the same page about more issues than you had thought. In that case, a relatively short, straightforward process may be in order.

Perhaps your early work has revealed big issues and questions that must be addressed. In that case, you may want to slow down or get outside help. You may see the need for extensive research, or interviews of partners, funders, and stakeholders. (See the "Gaining Perspective" section of this guide) These factors may warrant an extension of your timeline, a more involved process, or both.

There are no hard and fast rules about length of strategic planning processes. Some good ones are as short as two months. These are usually minor tune-ups for groups that have few big current issues to address. Others may be as long as two years. These are exceptional cases, often involving large, complex, spread-out organizations that cannot

meet in person frequently and that are working on a significant update of their plan in light of new realities.

That said, 3-6 months is about right for most organizations in most cases. That is usually long enough to get the job done well without risking planning fatigue.

One key consideration when determining scope and timeline is the number of in-person meetings of the full board or full staff that your group will need to explore your key strategic questions well. Another is the practical question of when and where those meetings can be.

Two particularly important to ink in as early as possible are a board and staff retreat and the target date for the board's adoption of the plan. Leave enough time between those two dates for the plan to be drafted, refined, circulated for review, and prepared for a presentation by the planning team with a recommendation for the adoption date.

Finance, fundraising, and communications from the start

Too often, groups spend almost all their strategic planning time thinking about program goals and strategies, then hastily tack on expectations about fundraising, communications, and related considerations at the very end of the process. Problems invariably ensue. **To avoid them, devise ways to weave in fundraising, communications, and related matters from the start.**

One way to do this is to make fundraising and communications part of every discussion throughout the process. Another is recruit finance, fundraising, and communications staff members and board committee members to serve on the planning team. Another crucial one is to ask them to provide a reality check about the plan that begins to emerge. After all, what good is the finest-sounding program plan if it can't be described compellingly to current and potential supporters?