



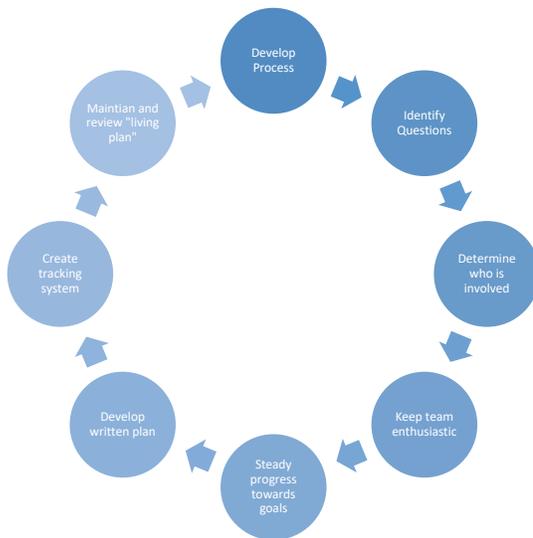
Introduction

An important investment

Strategic planning can be the most valuable investment of time and energy your group ever makes. A good planning process can help you:

- Clarify long-term goals and develop more robust strategies
- Find ways to build on current strengths and opportunities
- Identify current limiting factors and decide how to address them
- Determine medium-term priorities and resource needs
- Promote camaraderie and teamwork within your group
- Engage important outsiders in meaningful ways
- Provide the basis for more effective communications and fundraising going forward

All this can add up to a much more effective pursuit of your mission.



With this guide, we offer ideas for making the most of your next strategic planning process, to help you:

- Develop a process that fits your group’s unique needs
- Identify the most important questions to explore
- Determine who should be involved when and how
- Keep your team enthused and constructively engaged
- Make steady progress toward important decisions
- Develop a written plan that will be useful
- Create a system for tracking progress
- Maintain a useful “living plan” that is reviewed and revised on a regular basis

Strategy vs. planning

Strategic thinking is more important than strategic planning and far more important than a strategic plan.

What is “strategic thinking”? It’s staying focused on our long-term goals while thinking critically about whether our strategies are sound. It’s being open to changes in approach that can bring the results we want faster or more efficiently. It’s keeping our eyes on the prize – while constantly looking for the very best ways to achieve it.

That’s why the single most important result of a good strategic planning process is a group that is well prepared to think strategically together, *going forward*.



A written plan is an important result of a strategic planning process. But a written plan *is simply a snapshot of our best strategic thinking at a particular point in time*. It's not an immutable object; it can and should be updated periodically as circumstances change and our thinking evolves. It's not a set of rigid sideboards; it doesn't lay down laws that require us to do everything in it and prohibit us from doing anything else.

A strategic plan is simply a tool we create for ourselves. It helps us clarify direction, set priorities, focus, identify needed resources, communicate, fundraise, organize, and recruit. Perhaps most importantly, it provides a framework for our ongoing strategic discussions which should begin as soon as the written plan's ink is dry.

Like a good knife, a strategic plan is a tool that needs regular sharpening to remain useful. For these reasons, we at TREC promote a *living strategic plan*: one that is used, evaluated and updated as regularly as necessary – as opposed to one that simply sits on a shelf until it is replaced years later.

Planning frequency and scope

Many nonprofit groups go five years or even longer between formal strategic planning processes. We believe that shorter planning cycles are usually better.

Politics, laws, regulations, economics, demographic and social trends, the strength of partners and opponents, and numerous other factors typically change a group's external operating environment substantially in five years. Internal factors, including funding, capacity, leadership, or tactics, usually change a great deal as well.

For these reasons, a three-year cycle for strategic plan updates usually makes more sense than five. Four years makes sense for some groups, especially those that are involved in or affected by elections at that interval.

Some groups are leery of a shorter cycle. This is usually because their last experience with strategic planning was very time consuming, unproductive, or both.

The best way to make the next process enjoyable and worthwhile is to keep the current plan alive. With regular plan revisions, informed by experience with the current plan and ongoing strategic thinking, strategic planning revisions at the three- or four-year interval can often be updates, not overhauls.

There are exceptions. Overhauls are needed when external or internal factors change significantly, or when progress toward long-term goals is unsatisfactory. Extra time and effort are necessary in these cases.

In any case, a strategic planning process should be designed to engage all staff and board meaningfully and efficiently, so that the process is productive and rewarding. The methods for doing so will vary from case to case. Some options are discussed in this guide.

No two organizations are the same. No one organization is the same from one cycle to the next. With this guide, we offer suggestions for customizing your approach.