Self-Guide for Preparation

Things to consider for your organization's strategic planning process

MISSION MATTERS
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Planning Team

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

Create a list of potential members of the planning team to guide the process. (Typically board & staff - may include stakeholders)

Timeline

Start the process far enough in advance to allow time for all stages of the planning.

High level planning stages

Prior to budget year	Place planning expenses in budget
6 months before	Form the planning team & set date
5 months before	If you will work with a consultant, hire
4 months before	Plan the process, assess data needs
3 months before	Seek stakeholder feedback & compile

Stakeholder Engagement

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

What individuals or groups have an interest in your organization and a stake in your success? (clients, volunteers, donors, community partners etc.)

Data

What data do you have in place that helps to paint a picture of your organization? What might you need to gather as a part of the strategic planning process?

Here's what we have!

- [ ] Client feedback survey
- [ ] Agency strengths/weaknesses
- [ ] Community needs assessment
- [ ] Trends analysis
- [ ] Organizational history - other data
- [ ]

Choosing a Consultant

If you choose to work with an outside professional to facilitate your process, here are some things to consider.

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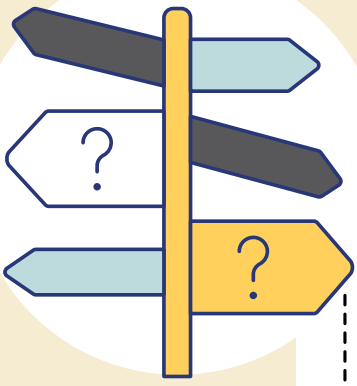


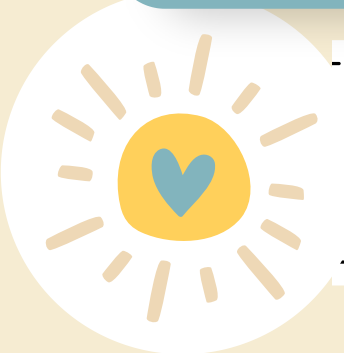
Training and Competencies

- Certified or trained to lead strategic planning
- Skilled at identifying the key questions facing the organization
- Knowledgeable of facilitation techniques to invite all voices into the discussion and move the process forward
- Understand various approaches to strategic planning
- Factor in existing information (mission, current plan, etc.)
- Culturally competent to work effectively with diverse groups and able to integrate your DEI goals into the overall strategic plan

Knowledge and Background

- Have a history of working with nonprofits
- Understand organizations of your size
- Familiar with your mission, community, and state
- Recognize the importance of customizing to you
- Provide references for you to contact

Character and Personality



- Care about your cause and share your values
- Seek to learn about your organization
- Communicate in a manner with which you align
- Co-create the process with the board and staff team