



# Maximizing Strategic Planning

Take steps to ensure your planning process is effective and engaging.

**Are you thinking of embarking on a strategic planning process?**

A solid strategic plan will provide a road map for your organization's future. But without the right input and preparation, you can end up with just another binder of good ideas gathering dust on the shelf. To get the most out of your planning process, take steps to position your organization to develop an inspired and actionable plan.

Three steps to prepare for strategic planning:

➤ **Set the context.**

Consider what successful planning will look like for your organization: identify specific issues to address and define any non-negotiable factors to consider up front.

- Think about your mission delivery and how you could have even greater impact.
- Ask if you have financial stability and capacity to support your programs and services in terms of planning, leadership and staff, technology, and infrastructure.
- Confirm your commitment to being objective, gathering the needed information, asking hard questions, and supporting organizational changes that may arise from the planning process.

**JGA's strategic planning process often includes:**

1. **Creating a strategic planning committee** of key staff and volunteer stakeholders.
2. **Assessing the current state of your organization**—including critical issues you face and an environmental scan.
3. **Developing specific elements of the plan**, including overarching goals, as well as objectives and tactics.
4. **Testing elements of the plan** with a broader audience to get external perspective.
5. **Developing supporting materials**, such as budgets, tactical management tools, development plans, and other planning.
6. **Approval of the plan** by the governing body.



### ➤ Design the process.

Take the time to create a multi-step process that engages the right stakeholders. This additional effort ensures a quality outcome. Review your past strategic planning processes and determine any planning approaches you want to keep.

- Ensure you have the right mix of individuals involved and are clear about role assignments, including who will provide input, make decisions, lead the process, and compile input and develop the plan.
- Confirm you have enough resources committed to successfully complete the planning process – including staff time, leadership and board time, and funds for research and/or consultants.
- Determine if you will use an existing committee or create a strategic planning committee.
- Consider if you have the capacity and ability to undertake the planning on your own or if you should use a consultant.
- Allocate enough time to complete the work needed to create a plan. It may require several months.

### ➤ Develop a resource-gathering plan.

Identify what additional information may be needed to support the planning process and determine how you will gather it from internal and external stakeholders.

- Define the key drivers for success.
- Determine external and internal information needed to inform the process.
- Confirm the resources that exist and those you will need to develop, including gaps in data that must be researched and if the planning team needs the perspective of other topic experts.
- Consider if there may be any high-impact decisions made soon that will affect planning.

## DISCOVER FOR YOURSELF.

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