

Planning to Plan: Strategic Planning Prep

Preparation Steps to Get the Most Out of the Strategic Planning Process | A solid strategic plan can provide a road map for the organization's future. But without the right input and preparation, an organization can end up with just another expensive binder of good ideas gathering dust on the shelf. To get the most out of the strategic planning process and position themselves to develop a truly mission-guiding plan, it is important that organizations do the right prep work.

Step 1: Setting the Context for Planning

Think of the parameters under which your organization will be undertaking the strategic plan and begin to identify what success will look like, specific issues you will need to address during planning, and any non-negotiables that need to be identified up front.

- ▶ How well are we achieving our mission and could we have a greater impact?
- ▶ Are our operations financially viable and how can we ensure financial stability?
- ▶ Do we have capacity to support our programs and services in terms of planning, leadership and staff, technology and infrastructure?
- ▶ Are we committed to look objectively and gather the needed information – organizational strengths, weaknesses, opportunities and threats; effectiveness of current programs; current and future community needs; competitor and potential collaborator information?
- ▶ Is there a willingness to question the status quo, ask hard questions, face difficult questions, and support organizational change that may arise from the planning process?

Step 2: Designing the Process

Take the time to create a process that will engage the right constituents over the right amount of time to ensure a quality outcome. Also, look at your previous experience with strategic planning and determine the parameters you can put into place that will make this process uniquely suited to your own organization's needs.

- ▶ Is there clarity on who will have input into the plan and who will be decision makers?
- ▶ Do we have the right mix of individuals involved – strategic thinkers, action takers, big-picture thinkers, detail-oriented thinkers?
- ▶ Do we have enough organizational resources committed for successful completion of the planning process – staff time, leadership and board time, funds for research or consultants?
- ▶ Will we use an existing committee or a strategic planning committee for coordination and planning assistance?
- ▶ Who will lead the process?
- ▶ Who will be the primary writer of the plan?
- ▶ Do we have the capability to undertake the plan on our own or should we bring in a consultant?

Step 3: Develop a Resource Gathering Plan

Identify how you will gather information from both internal and external stakeholders to utilize in the planning process.

- ▶ What external and internal information is needed to inform the planning process?
- ▶ What resources already exist and which will we need to develop?
- ▶ Are there gaps in data that must be researched?
- ▶ What are the key drivers for institutional success?
- ▶ Are there any high-impact decisions that will be made in the near future by an external source that will impact planning?
- ▶ Should we bring in a panel of topic experts to address our planning team?

JGA's Strategic Planning Process

The strategic planning process is an opportunity to chart your organization's course for the future. Over the past several years, JGA has provided a range of strategic planning services to our clients. True to our tradition of creating custom solutions, we help our clients create a tailored strategic planning process to best meet their specific needs. You can expect that a JGA-led strategic planning process will typically include the following core elements:

1. Creating a strategic planning committee

It is important for the strategic planning process to be led by a strong volunteer and staff group. We help clients identify the best structure for the planning process at their organization. This includes the creation of a strategic planning committee that is representative of the organization's key stakeholders.

2. Assessing the current state of the organization

JGA helps clients assess the outcomes of the most recent plan and leads a discussion to build consensus around the most critical issues facing the organization today. JGA also leads clients in an environmental scan to understand the context for the planning process.

3. Developing specific elements of the plan

The core of the planning process is the sequential development of the strategic plan elements, beginning with the overarching goals and progressing through the more detailed and measurable objectives and tactics. These are then further developed into action steps with specific metrics, timelines and assignments.

4. Testing elements of the plan with a broader audience

At some point in the strategic planning process, JGA recommends clients test some or all of the strategic plan with a broader audience beyond the organization. We create methods to test the goals and objectives with key stakeholders during the planning process so that we are certain to get an external perspective on the planning process in real time.

5. Developing supporting materials

JGA assists clients to develop materials that support the implementation of the strategic plan. These frequently include budgets, development plans, facilities plans, and other organizational infrastructure planning.

6. Approving the plan

JGA guides the planning process so the board of directors is informed each step of the way prior to being asked to approve the plan. Board approval should not be taken lightly – the board is approving the road map for the future.