



**Oliver Tessier
& Associates**

Nonprofit Leadership Specialists

Oliver Tessier
Principal

9905 Stoneybrook Drive
Kensington, MD 20895

oliver@otessier.com
office: 301.588.1430
mobile: 202.251.3855

www.otessier.com

Introduction to Strategic Planning

These are the steps in a full-scale strategic planning process.

Planning to Plan

- Structure the planning process, determining:
 - ✓ Who will participate: While the board has ultimate responsibility for strategic planning, it may choose to involve staff and selected constituents
 - ✓ Who will facilitate: Examine the tradeoffs between paying for outside professionals and using staff, board, or volunteers.
 - ✓ What the primary purpose of the process will be: Does the organization need a complete three-year plan, an update of its existing plan, a review of priorities?
 - ✓ Where, and when Strategic Planning will take place: The calendar and location are important. Allow yourself enough preparation time to make the planning exercise effective. Hold it in a location where people will be encouraged to think freely and will not be interrupted.
- Develop a communications plan for staff, board, and key constituents—including means for feedback.
- Identify a project leader to oversee the planning effort, someone who will take responsibility for the many administrative details of completing a plan.

Environmental Scanning

Staff involvement is strongly advised in this phase, as staff will be most familiar with the environment; however, scanning can be done by any combination of staff, board, and outside professionals.

- Assess the climate in which the organization works: What are the dominant issues, where is the competition, where are the gaps in service?
- Assess the organization's ability to achieve its mission in the context of the current operating environment: Where does it excel, where does it need work given the dominant issues identified?

Preparation

- Review/develop the organization's vision (what it wants to see as a result of its efforts).
- Review/develop the organization's mission (its primary purpose) in the context of its vision.
- Review/develop the organization's values to ensure that they support the mission.



Introduction to Strategic Planning

page 2 of 2

Developing the Plan

- Identify the expected outcomes of the planning session.
- Seek consensus on the organization's vision, mission, and values.
- Identify the strategic issues based on the vision, mission, and environmental scanning.
- Develop the strategic goals for the issues identified.
- Define the strategies the organization must take to address the key strategic issues and make significant progress toward the achievement its organizational vision.
- Examine the resource demands of strategies and incorporate provisions for them into the plan.
- Develop evaluation criteria by which success will be measured.
- Identify next steps for board and staff. Assign responsibility for tasks.

Implementing the Plan

- Have management identify the operational goals and objectives that will support the strategic priorities stated in the plan.
- Have those who will implement the plan develop a business plan that will support the strategic goals and objectives:

Action steps

- ✓ Identify what will be done, who will do it, and when will they do it.

Evaluation protocol

- ✓ Define how you will know when interim objectives and the final goals are achieved.
 - ✓ Define the indicators of progress and how will they be monitored.
 - ✓ Decide how results will be reported and to whom.
-
- Ensure that the board takes into consideration both action and resource issues in approving the annual business plan that supports the strategic plan.
 - Ensure that management, the CEO, and the board are evaluated annually against the priorities established in the strategic plan.