

# Is Our P & A Ready for Strategic Planning?

Strategic planning is the process of determining 1) what your P& A intends to accomplish over a specified period of time 2) How will you direct the P & A and its resources toward accomplishing these goals over the coming months and years?

It should be noted that planning for an upcoming year or more specified planning of an overall strategic plan is called **Organizational Planning**. Strategic planning involves long term planning. The P&As are mandated by law to engage annually in a priority setting process. While helpful in planning for the specific obligation of the federal grants, this process should not be used in lieu of a strategic planning process.

## **Fundamental Areas That Strategic Planning Usually Involves:**

- ❖ The mission, goals, vision your P & A will pursue
- ❖ Whom your P & A will serve
- ❖ The P & A's role in the community
- ❖ The kinds of programming, services, or products you will offer
- ❖ The resources needed to succeed - people, money, expertise, relationships, facilities, etc.
- ❖ How best to combine these resources, programming, and relationships to accomplish your P & A's mission?

## **Potential Benefits Of Developing A Strategic Plan**

- ❖ Improved results of organization's performance
- ❖ Momentum and focus
- ❖ Addresses the organization's most critical problems, choices, and opportunities
- ❖ Teamwork, learning and commitment
- ❖ Communication and marketing
- ❖ Greater Influence in the community

## **Questions You Should Ask To Evaluate The Readiness Of Your Organization To Proceed With A Strategic Plan**

### ***Is Your Organization In A State Of Chaos?***

It is inherently a part of the lifecycle of any nonprofit to go through a period of uncertainty, conflict, or chaos. This is not the time that your P&A should engage in the strategic planning process. During this period of internal stress, the organization is still in a vulnerable state of dealing with immediate issues which deters from the ability to adequately focus on long term planning.

### ***Is Your Organization Undergoing Significant Transition or Just Hired a new ED?***

While tempting to want to jump right into strategic planning after the forward-looking discussions of an Executive Director search, this may not always be the best course of action. Giving the new ED or other new senior staff an ability to understand why and how the organization does its current work provides an opportunity for new staff to learn the internal and external landscape as well as provide existing staff an opportunity to share their accomplishments, hopes and dreams with new leadership. The new ED can use this information to form a plan to focus strategic planning efforts and provide an time for staff to build trust of their new leader.

### ***Do I Have All The Background Information?***

It is important that if this step has not been done, there needs to be a commitment by the board, executive director, and staff to initiate this process. Information gathering is critical to an effective strategic planning process. Information gathered beforehand can come from such methods as:

- Conversation, interviews, focus groups, community meetings
- Questionnaires
- Analysis of existing information such as organizational records or past reports
- Organizational and board assessments

### ***For What Period Of Time Are You Planning?***

The nonprofit sector is such a volatile sector that the traditional 5-10 year planning process has proved to sometimes be futile to today's nonprofit organizations. It is suggested that a strategic plan cover a period of 3 years due to the nature of funding cycles and a constant shift of resources. Larger

organizations that tend to have more of a stable funding base and are more complex may need more than a three year strategic plan.

### ***Is Your Board Ready?***

The Board is one of the most crucial stakeholders in the strategic planning process. The board is charged with the governance of the P&A. In addition, the board must be a part of any process that will determine the future direction of the P&A. Oftentimes the strategic planning process influences future financial commitments and allocation of resources. As fiduciaries of the organization, it is imperative that board members are allowed to participate. It is vital that the entire board or as many members as possible are able to attend. Please keep this in mind when settling on a date and location.

### ***Do You Have Buy-In From All Stakeholders?***

Once the board has bought in to the process, the next step is making sure that all other stakeholders are on board. The staff plays an integral role in the organizational planning stage of the overall plan. It is for this reason that it is extremely important that staff and any other groups participating are fully aware of their respective roles in this process.

### **Conclusion**

If you were able to answer yes to all but the first two questions, then it is very likely that the P & A is prepared to begin the planning process and preparation for a strategic planning retreat. Once the organization has committed to this process, there should be immediate efforts to contact a consultant and/or NDRN to assist in this next stage.