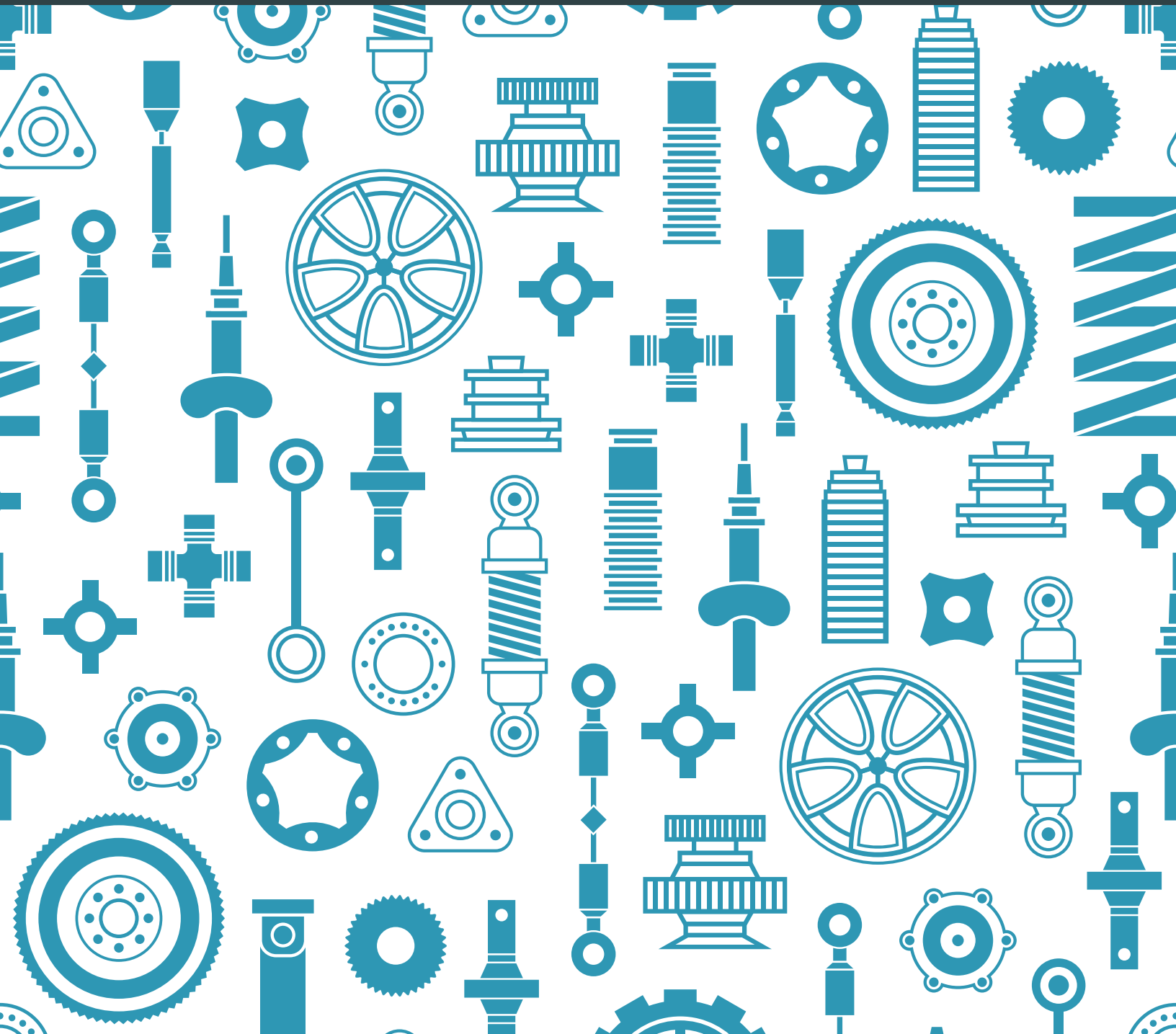


# Elements of a STRATEGIC PLAN





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## CONTEXT FOR PLANNING

- Statistics, trends, and other research data about the environment in which the organization operates (likely internal and external circumstances)
- Need to strengthen or add new current programs and services (constituent input is especially important)
- Advocating reallocation of limited resources by eliminating weak or tired programs and activities to help finance new and opportunistic ones

### **Common obstacle in planning: Conflict**

When you bring a diverse group of people together to plan, there may be conflict. However, conflict in and of itself is not bad; in fact, it can foster critical, strategic thinking. The challenge is in managing conflict so it doesn't derail the meeting.

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## PURPOSE, DIRECTION, AND PRINCIPLES

- Statement of mission and purposes (reaffirmation or revision)
- Staffing (current and projected needs)
- Board of directors (membership, size, method of selection, board member performance assessment, meetings, committee structure, and other bylaw provisions)
- Financial projections (income, expenses, reserves, new revenue streams)

### **Common obstacle in planning: Poor communication**

To avoid a breakdown in communication and ensure that relevant parties are kept informed, it is advisable to implement a communications process that systematically manages the information flow.

### **Common obstacle in planning: Inability to reach consensus**

Consensus is essential to strategic planning. Few things are more frustrating than thinking you reached a consensus only to discover soon after that the agreement has fallen apart. It is essential to confirm agreements at every critical juncture.


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## THE CURRENT-YEAR PLAN

- Public education and relations strategies (How do we get our story out?)
- Fundraising goals and strategies that set the stage for subsequently framing an explicit case statement (a case for support from individuals and other funders)
- Membership development and retention strategies (if appropriate)

 **Common obstacle in planning: Missed deadlines**  
Continually missed deadlines are evidence that the priority for planning is low. Is there a legitimate explanation, or is there an organizational crisis? Does the timeline need to be revised? A planning process that is drawn out over too long a period loses momentum and commitment. You may need to get renewed commitment from key players.

 **Common obstacle in planning: Unequal participation**  
Participative planning assumes that all or most individuals in the organization contribute in one way or another. To address this issue, be certain that the right stakeholders are at each meeting and the facilitator is encouraging input from everyone there.

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Sources: [\*Driving Strategic Planning, 10 Basic Responsibilities of Nonprofit Boards\*](#)