

5 Phases of STRATEGIC PLANNING

Strategic planning often unfolds in a series of five phases, with each phase building on the one that came before. When beginning a new phase of strategic planning, it is important to keep a few key questions in mind.

1. PLANNING TO PLAN

The planning to plan phase focuses on what the strategic planning process will look like and who will be involved. Begin by addressing the following questions:

- Is our organization ready for strategic planning?
- Who will facilitate the process?
- Who will we include in the planning process?
- What kind of resources do we need?

2. UNDERSTANDING THE CONTEXT

To fully understand the context in which your organization exists and to evaluate the various forces that affect its present and future, it is important to compile, synthesize, and absorb information about your organization's external and internal environments.

In scanning the **external environment**, it is important to determine opportunities as well as threats or obstacles. Use the following questions to help guide discussions:

- What opportunities and threats does the organization face?
- What do external stakeholders (clients, partners, community) want, need or expect from the organization? How do we know?
- How well does the organization perform relative to other organizations doing similar work? (competition for clients, volunteers, support, etc.)?
- How might changing demographics or environmental, economic, social, and political trends affect our constituents and our work?

Historical data about your organization's past provide valuable information on the **internal forces** that shape its future. The historical synopsis might include a description of major milestones, events, or changes and the impact those have had on your organization.

- What has changed recently (leadership, personnel, or mission)? What does this tell us about our organization?
- How and why has our economic status, funding, or programming changed, both recently and historically? Why?
- How sustainable are our resources?
- Are our members and other stakeholders satisfied? How do we know?
- What are the needs and expectations of our clients? Are we meeting them?

3. AGREEING ON PURPOSE AND DIRECTION

Once you understand the purpose and context in which the organization operates, it is time to address questions regarding the vision and mission. The third phase should address foundational agreements such as:

- Why does the organization exist?
- What will be the ultimate result of its work?
- What are the organization's values?
- What do we want the organization to have achieved and by when?

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4. MOVING FROM VISION TO ACTION

Set vision priorities

After agreement on the mission and vision, the next phase is to agree on three to five important areas of focus in order to achieve the vision. These may also be called goals.

- What concrete goals can we take to move towards our vision statement?
- How will we know when the goals have been met?

Assess the infrastructure

With the mission and vision priorities defined and confirmed, the next step is to ensure that your organization is organized to do the work today that will support the vision priorities you have identified for tomorrow. Questions to address include:

- What are the functions in the organization (financial, programmatic, support, etc.) and how do they relate to each other?
- How well will our current infrastructure enable us to achieve our vision priorities?
- Are there any functions missing?
- Do we have functions we no longer need?

5. MONITORING PROGRESS

Strategic planning does not end when the plan has been written and distributed. A well-formed framework or plan will guide decision making and help ensure that all activities and programs are aligned with the organization's mission. Ongoing monitoring and revision are two important aspects of effective strategic planning. The organization should ask itself:

- How are we incorporating the priorities, goals, and actions of the strategic plan into program and individual work plans and budgets?
- Do we have appropriate evaluative metrics in place to help regularly review performance?
- Are we referring back to the strategic plan in less formal ways, such as during board meetings, staff meetings, committee meetings, and individual performance reviews?