

Best Practices for Strategic Planning Whatcom Council of Nonprofits

Strategic Planning

A. Strategic plan is guided by organization mission.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	1. Board and staff members understand the organization's mission.	1.1 Executive Director and Board leadership review mission statement on annual basis with Board and staff.(See Board of Directors/Governance)

B. Strategic plan is based on sound planning principles.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	1. The Executive Director and Board determine readiness for strategic planning process	<p>1.1 Executive Director and Board leadership define strategic planning, identify its value to the organization and communicate this to the entire organization.</p> <p>1.2 Executive Director and Board leadership assess organizational readiness for strategic planning.</p> <p>1.3 Executive Director and Board leadership identify and develop the basic steps and process involved in designing an effective strategic plan, including: reviewing and articulating the mission; assessing the organization and its environment; developing strategies, goals and objectives; and designing operation, program, fund raising, and marketing plans.</p>

C. Plan makes the best use of human, financial, and material resources.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	<p>1. Resources required for strategic planning are identified and managed appropriately</p>	<p>1.1 Executive Director and Board leadership determine how much time and money can reasonably be allocated to the planning process.</p> <p>1.2 Organizational leadership define roles and expectations for all participants, including Board, management, staff, volunteers, and other stakeholders and identifies a strategic planning leadership team representative of stakeholders throughout the organization.</p> <p>1.3 Executive Director and Board leadership identify need for and roles of any external consultants and ways to manage those consultants to maximize their effectiveness and minimize costs.</p>
<p>2. Planning includes information regarding client and community needs and organization capacity.</p>	<p>2.1 All participants analyze opportunities and strengths in terms of current organization capacity.</p> <p>2.2 All stakeholders assess and prioritize opportunities in terms of community needs.</p>	

D. Plan takes into account organization strengths, weaknesses, opportunities and challenges.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	<p>1. Development of plan includes organization strengths, weaknesses, opportunities and challenges on a continuous basis and incorporates those observations into the strategic plan.</p>	<p>1.1 Strategic planning leadership team works to conduct an analysis of strengths, weaknesses, opportunities and challenges that involves internal and external stakeholders and includes a cost-benefit analysis of both tangible and intangible costs and benefits.</p> <p>1.2 Strategic planning leadership team conducts a comprehensive competitive analysis.</p>

E. All stakeholders are included in the planning process.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	<p>1. Planning leadership team communicates openly and effectively about strategic planning process and progress to build trust and confidence and full participation in the planning process.</p>	<p>1.1 Strategic planning leadership team identifies roles for all internal and external stakeholders to monitor the plan's implementation and effectiveness.</p> <p>1.2 Strategic planning leadership team identifies effective group processes and other activities (focus groups, workshops, retreats, etc.) needed for information gathering and for soliciting input from all stakeholders</p>

F. Organization activities are tied to strategic plan, with a minimum of distractions by crises.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	<p>1. Implementation of the plan is regularly monitored.</p>	<p>1.1 Use the results of the analysis and assessment processes to develop action plans in each strategic area: operating, programs, fundraising, and marketing.</p> <p>1.2 Develop objectives for each action plan.</p> <p>1.3 Develop an implementation schedule based on objectives stated in each action plan.</p>

G. Organization uses its own outcome data as well as demographics, statistics on relevant community issues, and information on best practices to plan improvements to services.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	1. Board understands the work that has already been done by staff to respond to evaluation findings and improve products and services.	1.1-3.1 Strategic planning leadership team designs a presentation that documents the work that has already been done and includes visual displays of community statistics, findings from the evaluation report, and information from the field.
	2. Local demographic and statistical information is factored into planning efforts.	
3. The Board reviews information from the field against which to compare organization's performance.		

H. The plan includes expected shorter-term and longer-term outcomes.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	1. A matrix is prepared by program or management function that identifies outcomes and connects them to the activities or strategies that the organization will use to reach these outcomes.	1.1 Strategic planning leadership team develops a report including summary of planning process, internal and external assessments, prioritization of needs and development of an overall organizational matrix of measurable outcomes and presents that plan for approval to the Board

I. Plan is updated annually.

Strategic Planning	Best Practices	Suggestions for Achieving Best Practices
	1. The strategic plan is reviewed on an annual basis.	1.1 All stakeholders participate in continuous monitoring of the strategic plan and make adjustments as necessary.