

Strategic Planning

Phase 1

Getting Ready: summarize organizational history and need for strategic planning

Phase 2

Revisit mission, vision and values

Phase 3

Assessing the environment

- Review previous and current strategies
- Gather input from internal and external partners
- Gather information about program effectiveness
- Identify issues or questions

Phase 4

Agreeing on Priorities

- Analyze strengths, weaknesses, opportunities, threats
- Choose criteria for setting priorities
- Write goals and objectives

Phase 5

Writing Strategic Plan

- Write, review and adopt strategic plan

Implementation

- Write annual operating plan with staff and budget to implement plan

Evaluation

- Develop outcome measures to evaluate effectiveness of organization

Organizational Capacities

Leadership Capacities: *help an organization to direct its own actions to achieve goals and to attract the cooperation of others to its goal and vision.*

- Staff
- Board/Governance
- Mission/Vision/Values
- Community Role

Results Capacities: *help an organization to deliver impact and to make the desired difference in the world.*

- Fundraising
- Programs

Enabling Capacities: *help and organization to gain the internal strengths necessary for facilitating its other functions.*

- Financial Management
- Systems
- Marketing and Communications

Adaptive Capacities: *help an organization understand the environmental context and adapt nimbly and strategically to changing circumstances.*

- Impact/Evaluation
- Planning

Organizational Capacities¹

Staff: Leadership and Team

The employees of the organization, including staff leader(s) and the policies/procedures that define staff responsibilities, performance, and terms of employment. May also include consultants, contractors, and volunteers who support staff or extend the capacity of staff.

Board/Governance

The organization's management and/or board structure. How the organization is managed and governed, which includes the specific responsibilities defined both by law and by the culture/structure of the organization.

Mission/Vision/Values

Mission, Vision and Values statements help define the purpose and direction of a successful organization. These statements intentionally affect strategic decisions.

¹ Adapted from *Smart Growth: A Life-Stage Model for Social Change Philanthropy*, Women's Funding Network, San Francisco, California: 2004.

Community Role

The organization chooses an appropriate level and type of organizational leadership and influence to exercise within the community or in its desired sphere of social change. This role may include partnerships and alliances to gain support for an issue or cause as well as the bridging process between other community groups or emerging networks relevant to the organization.

Fundraising

Includes the processes by which an organization generates funds and sustains diverse financial and material resources.

Programs

The service and/or policy programs the organization offers to the community. Evaluation of programs helps guide future planning.

Financial Management and Resource Development

Where and how an organization funds itself. Including the management of funds and cultivation of best financial practices so as to maximize the value and growth of actual resources.

Marketing and Communication

The marketing plans and strategies that help the organization gain visibility. Also refers to how the organization communicates with the community at large.

Systems: Administrative, Technology and Infrastructure

The internal systems used by the organization. These systems include, but are not limited to, what technology systems are used, what internal communication systems are in place, what data collection tools are used, and what systems are developed to ensure that the administrative functions of the organization run smoothly.

Impact/Evaluation

Ways for an organization to assess, evaluate or measure the social change they are achieving through their work. This is done so an organization can continuously improve their work while proving to others that their work is of value.

Planning

How the organization plans for its future, including development and integration of the organization's mission and vision. This also includes planning both for short and long-term sustainability.