



Strategic Planning

Strategic planning is an organization's process of defining its strategy, or direction, for the next 3-5 years, and making decisions on how it will allocate its resources to pursue this chosen strategy. In other words, strategic planning asks and answers the following questions: "Where are we now?", "Where do we want to go?", and "How will we do it?" Each organization varies in how it does strategic planning, but it generally takes 6 months to 1 year to complete the process.

Phases

Strategic Planning is usually completed in the following five phases:

- **Phase 1 - Getting Ready**
 - Summarize organizational history and need for strategic planning
 - Revisit mission, vision and values
- **Phase 2 - Assessing the environment**
 - Review previous and current strategies
 - Gather input from internal and external stakeholders
 - Gather information about program effectiveness
 - Identify issues or questions
- **Phase 3 - Agreeing on Priorities**
 - Analyze strengths, weaknesses, opportunities, challenges/threats (SWOT)
 - Choose criteria and set organizational priorities
- **Phase 4 - Writing Strategic Plan**
 - Write goals, objectives, outcome measures, budget
 - Review, revise, and adopt strategic plan
- **Phase 5 – Implementation and Evaluation**
 - Write implementation and monitoring plan
 - Develop performance indicators to evaluate effectiveness of plan in relation to activities of the organization

One common strategic planning mistake is to leave out Phase 5 - the implementation and evaluation step. Groups that don't complete this phase often find themselves 3 to 5 years later revisiting a document that doesn't resonate with where their organization has gone.



Roles in Strategic Planning

Most organizations find it helpful to have a Strategic Planning Committee comprised of:

- Staff leadership of the organization (usually the Executive Director, and perhaps other senior staff)
- Board members
- Other interested individuals who may not be affiliated with the organization in a staff or Board capacity (perhaps a client, donor, volunteer)

The Committee as a whole keeps the work moving and helps the organization incorporate the strategic planning activities in a general on-going way. For more information on this topic, please refer to the affiliated document "Roles in Strategic Planning."

Do we need to hire a consultant?

Organizations often hire an outside consultant to add objectivity and autonomy to the process while also alleviating the stress of the additional work load for staff. A consultant may act as a mere facilitator who directs the process and runs the meetings but does not impose his or her opinions in any way. A consultant may also act as a professional guide who shares expertise on key issues, conducts information gathering through interviews and other methods, and coaches the board and staff on final production of the plan. McAlpine Consulting for Growth has worked in both capacities with a variety of clients. We specialize in listening to our clients and tailoring the strategic planning process to fit their needs.

In a typical strategic plan, we provide the following services:

- Creation of a strategic planning timeline
- Overall project coordination and scheduling of meetings
- Facilitation of all committee meetings and retreats
- Assessment of organizational capacities and growth stage
- Formation of external assessment questions, and implementation of external assessment methods (survey, focus group, interviews)
- Assistance with setting organizational priorities
- Writing the strategic plan with Executive Director and Committee
- Development of implementation plan and evaluation measures



MCFG Strategic Planning Clients

Below is a sampling of our strategic planning clients:

- Angelic Organics Learning Center
- Centro de Salud Esperanza
- Cook County Department of Public Health (with PwC)
- Cream City Foundation
- Illinois Department of Public Health
- KAN-WIN
- Lesbian Community Cancer Project
- Michigan Breastfeeding Network
- Neighborhood Writing Alliance
- Peoria City/County Health Department
- Rock For Kids
- Wellness House



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