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Strategic Planning

Strategic planning is an organization's process of defining its direction for the next 3-5 years, and making decisions on how it will allocate its resources to pursue this chosen strategy. Strategic planning asks and answers the following questions:

"Where are we now?"
"Where do we want to go?"
"How will we get there?"

Each organization varies in how it does strategic planning, but it generally takes nine months to one year to complete the process.

SERVICES WE OFFER

Our firm typically facilitates a robust, five-phase process to support the development of a strategic plan. Our consulting practice is interactive and structured to allow for generative conversations that bring forward the best thinking about how to build upon the strengths and major accomplishments of the organization while also thinking critically about the best ways to position the organization for future growth.

In addition to an aspirational plan, it is our goal for organizations to gain a better understanding of how to continue strategic thinking by staff and board, and engage in opportunities to have these conversations with the community that is central to the mission.

Phase 1	<i>Getting Ready</i>	Phase 2	<i>Assessing Environment</i>
<p>Summarize organizational history and need for strategic planning</p> <p>Revisit mission, vision and values</p> <p>Identify critical issues and questions</p>		<p>Review previous and current strategies</p> <p>Gather input from internal and external stakeholders</p> <p>Gather information about program effectiveness</p>	
Phase 3	<i>Agreeing on Priorities</i>	Phase 4	<i>Writing Strategic Plan</i>
<p>Review information gathered</p> <p>Analyze strengths, weaknesses, opportunities, challenges/threats (SWOT)</p> <p>Choose criteria and set organizational priorities</p>		<p>Write goals, objectives, actions, and performance indicators</p> <p>Review, revise, and adopt strategic plan</p>	
Phase 5		<i>Implementation and Evaluation</i>	
<p>Write implementation and monitoring plan, including timeline, responsible parties & budget impact</p> <p>Develop performance indicators to evaluate effectiveness of plan in relation to activities of the organization</p>			

Roles in Strategic Planning

We work with a Strategic Planning Committee (SPC) comprised of board members and staff leadership. The SPC keeps the work moving and helps the organization incorporate the strategic planning activities into its operations.

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 workload for staff. As consultants, we define ourselves primarily as facilitators, specializing in listening to our clients, and tailoring every project to their needs. We provide insight and analysis based on our experience, but we will not push a particular agenda or expect a role as a decision-maker.

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 board functionalities
- Development and implementation of internal and external assessments
- Assistance with setting organizational priorities
- Facilitation of writing sessions with organizational representatives to develop goals, objectives, actions, and performance indicators
- Development of implementation plan and evaluation measures

Strategic Planning Retreat

Facilitation of a full day strategic planning retreat is part of our five phase process. We also offer strategic planning retreat facilitation as a standalone service. We assist our clients with:

- Establishing retreat objectives
- Developing the retreat agenda, which we suggest includes:
 - Welcome/Introductions/Retreat Overview
 - Review and affirmation of Mission/Vision/Values
 - Summarize information gathered
 - SWOT (strengths, weaknesses, opportunities, threats) Analysis
 - Setting Priorities—the heart of the retreat, as it will form the basis of the strategic plan
 - Close out and evaluation

We work with the Strategic Planning Committee to set the retreat objectives and agenda, determine pre-retreat communication with participants, and manage retreat logistics regarding space, materials, etc.

Pricing

Pricing for financial management varies based on the scope of work. Pricing is based on standard consulting fees of \$225/hr for Laura McAlpine; \$200/hr for Mac Grambauer; \$100/Project Associate. There is a 10% discount for projects lasting six months or more. Please contact us directly at mac@lmcalpine.com or 773-728-0271 for more details.

References

MCFG has served over 30 non-profits in strategic planning facilitation since 2001. We have facilitated successful processes with Center for Enriched Living, Chicago Survivors, Gerber/Hart, Heartland Health Centers, KAN-WIN, Les Turner ALS Foundation, Public Health Institute of Metropolitan Chicago, and Chicago Women's History Center. In our work with Snow City Arts, Chicago Women's Health Center, YWCA Evanston/North Shore, and Howard Brown Health, we helped facilitate racial justice & equity conversations, and assisted the groups with thinking through how to build racial equity goals into their strategic plans. Please visit our website, www.lmcalpine.com, for more information on our clients and process.