

S – Strategic Planning

**The Role Of The Board In Strategic Planning
Strategic Planning Process**

The Fundamental Role of the Board in Strategic Planning

Planning, monitoring and evaluation are part of an integrated process.

Regardless of the board model, all boards must plan for the future of their organization and take steps to implement the vision. Therefore the fundamental role of the board in strategic planning is to:

1. Create and continually reshape the mission of the organization.
2. Develop goals that will move the organization towards its mission, as part of a strategic plan. Set the "rate of progress", which is how quickly the board can expect to see results of its strategic plan.
3. Monitor how effectively the organization is achieving its strategic plan.

Boards may choose to do more work on planning than the steps listed above, particularly if they are working boards or collectives.

Why plan?

Some boards are reluctant to spend board and staff time on planning, but planning is a good way to:

ensure the organization's services meet the community's changing needs

anticipate financial or funding changes

establish a process for on-going operations

enable the board and staff to make proactive rather than reactive decisions

help the board, staff, and committees develop a consistent understanding of their roles and the organization's goals

establish a framework for relationships with governments and other agencies
provide the community with an understanding of the work of the organization o
create a basis for future evaluations

What are the steps of a strategic planning process?

Strategic Planning Model

Many books and articles describe how best to do strategic planning. Here is a brief description of the five steps in strategic planning.

The steps outlined below describe the basic work that needs to be done and the typical products of the process.

Step One - Getting Ready

To get ready for strategic planning, an organization must first assess if it is ready.

While a number of issues must be addressed in assessing readiness, the determination essentially comes down to whether an organization's leaders are truly committed to the effort, and whether they are able to devote the necessary attention to the "big picture".

For example, if a funding crisis looms, the founder is about to depart, or the environment is turbulent, then it does not make sense to take time out for strategic planning effort at that time.

An organization that determines it is indeed ready to begin strategic planning must perform five tasks to pave the way for an organized process:

- identify specific issues or choices that the planning process should address
- clarify roles (who does what in the process)
- create a Planning Committee
- develop an organizational profile

- identify the information that must be collected to help make sound decisions.

The product developed at the end of the Step One is a Workplan.

Step Two - Articulating Mission

A mission statement is like an introductory paragraph: it lets the reader know where the writer is going, and it also shows that the writer knows where he or she is going. Likewise, a mission statement must communicate the essence of an organization to the reader. An organization's ability to articulate its mission indicates its focus and purposefulness. A mission statement typically describes an organization in terms of its:

Purpose - why the organization exists, and what it seeks to accomplish

Business - the main method or activity through which the organization tries to fulfill this purpose

Values - the principles or beliefs that guide an organization's members as they pursue the organization's purpose

The product at the end of Step Two is a draft mission statement.

Step Three - Assessing the Situation

Once an organization has committed to why it exists and what it does, it must take a clear-eyed look at its current situation. Remember, that part of strategic planning, thinking, and management is an awareness of resources and an eye to the future environment. You will need current information about the organization's strengths, weaknesses, and performance - information that will highlight the critical issues that the organization faces and that its strategic plan must address. These could include a variety of primary concerns such as:

- funding issues

- new program opportunities

- changing regulations, or changing needs in the client population.

The point is to choose the most important issues to address. The Planning Committee should agree on no more than five to ten critical issues around which to organize the strategic plan.

The products of Step Three are:

a database of quality information that can be used to make decisions

a list of critical issues which demand a response from the organization. T

These are the most important issues the organization needs to deal with.

Step Four - Developing Strategies, Goals, and Objectives

Once an organization's mission has been affirmed and its critical issues identified, it is time to figure out what to do about them: the broad approaches to be taken (strategies), and the general and specific results to be sought (the goals and objectives).

Strategies, goal and objectives may come from individual inspiration, group discussion, or formal decision-making techniques, but the bottom line is that, in the end, the leadership agrees on how to address the critical issues.

This can take considerable time and flexibility: discussions at this stage frequently will require additional information or a reevaluation of conclusions reached during the situation assessment. It is even possible that new insights will emerge which change the thrust of the mission statement. It is important that planners are not afraid to go back to an earlier step in the process and take advantage of available information to create the best possible plan.

The product of Step Four is an outline of the organization's strategic directions, its general strategies, long-range goals, and specific objectives of its response to critical issues.

Step Five - Completing the Written Plan

The mission has been articulated, the critical issues identified, and the goals and strategies agreed upon. This step essentially involves putting all that down on paper. Usually one member of the Planning Committee, the executive director, or even a planning consultant will draft a final planning document and submit it for review, to all key decision makers (usually the board and senior staff). This is also the time to consult with senior staff to determine whether the document can be translated into operating plans (the subsequent detailed action plans for accomplishing the goals proposed by the strategic plan).

Revisions should not be dragged out for months, but action should be taken to answer any important questions that are raised at this step. It would certainly be a mistake to bury conflict at this step just to wrap up the process more quickly, because the conflict, if serious, will inevitably undermine the potency of the strategic directions chosen by the planning committee.

The product of Step Five is a strategic plan!

Adapted from:

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