**Ten Steps to Strategic Planning**

* ***A clear and comprehensive grasp of external opportunities and challenges.*** It is essential that a strategic plan reflect the external environment. Program management and operational decisions should be re-examined and reshaped periodically in light of current trends and future projections.
* ***A realistic and comprehensive assessment of the organization’s strengths and limitations****.* A successful plan takes into consideration the capabilities and strengths, weaknesses and limitations of the program. Information, both objective and subjective, must be gathered from a wide array of sources, including staff and board members, care-receivers, volunteers, community leaders, funders and partnering organizations.
* ***An inclusive approach.*** A strategic plan should not become the exclusive responsibility of a select group. If the planning process is to succeed, it must incorporate the views of all the constituencies that will be affected by the plan or have a role in its implementation.
* ***An empowered planning committee.*** The core work for a strategic plan is generally entrusted to a small planning committee. The committee must be empowered with sufficient decision-making authority to keep the plan moving forward.
* ***Involvement of senior leadership.*** Some executive directors and board members are inclined to take a hands off approach to strategic planning. But their active participation is crucial; their vision and commitment are important.
* ***Sharing of responsibility by board and staff members.*** Professional staff and board members bring complementary skill sets and perspectives to the table. One without the other would result in a skewed and incomplete picture, and planning efforts should draw on both.
* ***Learning from better practices.*** It is possible to learn from the successes, failures and mistakes of others. Most organizations and foundations deal with challenges related to human resources, fund-raising, capacity building, organizational development and governance. It may be helpful to research many comprehensive planning processes from comparable organizations; this information can be found via research of relevant literature including journal articles and position papers, interviews and database searches.
* ***Clear priorities and an implementation plan.*** Developing a workable strategic plan means dissecting the organization’s objectives and strategies and determining which take precedence. When a planning committee focuses on

coming up with new ideas without determining which are most important, the task of implementing the plan becomes overwhelming and goals are rarely achieved.

* ***Patience.*** When an organization is making major changes and needs extensive buy-in from the executive director and board members, the process may not be perfectly linear. As information is gathered and analyzed, assumptions are rethought, new ideas emerge and old ones are revamped or discarded.
* ***A commitment to change.*** As client needs and market conditions change, strategies need to be revisited regularly. Sometimes all that is needed is fine- tuning; other times, a more fundamental rethinking of goals and opportunities may be required.