



10-Step Strategic Planning Guide

Follow these steps to streamline the planning process and ensure accountability as the plan is implemented

- 1. *Executive Director and Board Chairperson initiate the planning process and complete the following checklist:***
 - ✓ Decide who will be part of the strategic planning team
 - ✓ Write down a timeline for planning
 - ✓ Set the date for a full board retreat
 - ✓ Determine the scope and subject matter of the plan
 - ✓ Interview and hire a consultant to facilitate the planning retreat
 - ✓ Inform attendees

- 2. *Consultant conducts a pre-planning assessment with participants in order to:***
 - ✓ Introduce herself as the facilitator
 - ✓ Establish expectations for the day
 - ✓ Identify concerns or barriers to planning
 - ✓ Plan the agenda for the day with planning team, executive director, board input

- 3. *Executive Director, Board Members, and identified staff participate in the retreat:***
 - ✓ Name and prioritize the critical issues facing the organization
 - ✓ Identify how the organization will respond to those issues
 - ✓ Capture broad goals to guide the organization for the next 1-3 years
 - ✓ Plan next steps, follow up activities

- 4. *Consultant, Executive Director and Chairperson evaluate the process***

- 5. *Executive Director prepares draft of plan for initial review by planning team***

- 6. *Executive Director, Chairperson, planning committee revise plan as needed***

- 7. *Chairperson, planning team present final strategic plan to Board for approval***

- 8. *Executive Director and staff leadership develop annual work plans drawn from broad goals, to include:***
 - ✓ measurable outcomes
 - ✓ strategies to achieve

✓ accountability and timelines

9. *Executive Director provides progress reports to the Board at agreed upon intervals*

10. *Executive Director, Board, revise plan as needed throughout the implementation period.*