

Crafting a Strategic Plan That Works

February 20, 2019 – Gunnison, CO; February 21, 2019 – Ridgway, CO
San Juan Rural Philanthropy Days Leadership Committee

Presented by Illene Roggensack, Third Sector Innovations
www.thirdsectoronline.com thirdsec@earthlink.net

970.314.3970

Key Takeaways

Strategic Planning addresses the organization's concerns regarding its:

- Future
- Vision and Direction
- Responsiveness to Environment
- High-Level Goals
- Sustainability

Make certain that your organization is ready for strategic planning; Consider whether contingency or scenario planning will be helpful

Involve all key stakeholders, particularly those expected to contribute to its implementation

The planning *process* is far more important than the resulting document:

- Determine organization's goals for engaging the planning process
- Find and take the time to get people together to sit down and discuss
- Get a neutral/skilled someone to facilitate the discussions
- Make sure you have the required background and external information
- Confirm the organization's mission, vision and values, then proceed with planning
- Ask the hard questions; Be realistic
- Set and comply with deadlines

Write up the plan as a fluid document; create a condensed version for ready reference; revisit and modify frequently

Legitimize the process and plan document by making sure the numbers/dollars work

Align job descriptions, performance evaluation and other foundational guides with the strategic plan

Remember that a strategic plan is one of the most vital indicators of "an organization of excellence," and the plan document is perhaps the organization's most important resource development/ advancement tool