4 PLAN

It is important to clarify what specific areas of focus and strategies you will use to achieve your mission. Planning helps you to:

- **Chart** a course to turn your vision into reality;

- **Determine** what actions best support your Mission and Vision;

- **Ensure** that your plan is right-sized and achievable by analyzing resource and capacity issues;

- **Inspire** others to take action to help your organization to succeed.

Strategic Planners know at the PLAN stage that:

1. **It is important to prioritize.** Your organization needs to focus your work on areas that will make the most impact and the ambitiousness of the plan must match your capacity. Creating a "wish list" of all the things you would like to do is not as useful as a focused plan that prioritizes a few areas for action. You can't do everything—at least not all at once!

2. **A balanced plan attends to both programs and organizational health.** For example, you might consider having 1-2 program-related goals, one goal related to organizational health and capacity, and one related to fundraising and fiscal health.

   - It can be helpful to develop a high-level strategic framework to share publicly, and a more detailed implementation plan to guide management internally. Some groups create a multi-year strategic framework, but the supporting implementation plan is an annual plan that is updated each year.

3. **Objectives and timelines crafted by or in consultation with the people responsible for implementing them will lead to greater success**. Consulting the people who do the work will result in more realistic objectives and greater investment by those people in making them happen. Identify key people or committees to lead development of objectives for each strategic priority.

4. **Your plans should be aspirational but achievable**. It is important to find the sweet spot between an unambitious, uninspiring plan and a "pie in the sky" plan. How ambitious your plan is may depend on your organization's leadership, culture and past experience, whether you are in a field where there is rapid change, availability of funding to support growth, and other factors in your operating environment. Have an explicit conversation about these issues to determine where your organization should land.

Strategic Planners can show that they know these elements in the following ways:

A. Your plan has a small number of strategic priorities — no more than 3-5.

B. Your priorities relate to your Mission and Vision.

C. Your priorities include both program-related goals and organizational capacity-building goals.

D. Your objectives are a set of actions you will take to achieve progress toward each strategic priority. Your objectives are "SMART" — Specific, Measurable, Achievable, Relevant, and Time-Determined.

Strategic Planners produce these documents at this stage:

- Strategic priorities (3-5 key goals)

- Implementation plan (internal document detailing supporting objectives for each strategic priority)

There are a few key **tools** that might help you produce these documents:

- Implementation Plan Template/Action-planning Worksheet

- Sample Plans (see our website for links)

- SMART Objectives

These ideas have worked for other Strategic Planners:

- Generate a list of outcomes that you are working toward for each strategic priority, and then work backwards to determine the steps you need to take to get there.

- Use a prioritization exercise to narrow down ideas. Dot polling is one engaging way to do this (see resources).

- Assign each strategic priority to an appropriate group of staff or a board committee that will be involved in doing the work and let them create that section of the Implementation Plan.

- Find ways to welcome contrary thinking or questioning. It is a healthy part of the planning process to surface and examine assumptions underpinning your work.

- Check out La Piana's strategy pyramid and reflect on whether you have organizational, programmatic and operational strategies.

Congratulations! You're ready for the next stage…EXECUTE.