



# PREPARE



A key to successful Strategic Planning is “planning to plan.” To achieve a thoughtful plan that is truly strategic, you’ll need an effective process that is inclusive, transparent, and well-informed.



## *Strategic Planners know at the PREPARE stage that:*

1. **They understand the energy and time required to complete a quality plan and set aside the appropriate time and resources.** You may need to advocate for the value of Strategic Planning in order to gain buy-in and commitment from other organizational leaders. Be honest about what is required. If the organization is facing a crisis, work to resolve it before launching strategic planning.
2. **They build on any existing plan elements.** Do you like your current mission statement, or does it need revision? If you have a prior strategic plan, clarify your progress and accomplishments and decide what to carry forward.
3. **They know that there are different approaches to strategic planning.** These include: Classic Planning, Scenario Planning, Real-time Strategic Planning (La Piana Method), and more. Check our bibliography to learn more. Bottom line: there are lots of tried and true methods, but no one way to plan. This guide focuses on a classic approach that works well for most organizations.
4. **They scale their efforts to the organization’s scope and stage of development.** Evaluate your goals and desired pace, determine the amount of outreach you want to conduct during the process, and consider hiring a professional consultant to serve as a guide to reduce organizational workload and keep the process moving.
5. **They know their organizational history.** Write a short 1-2 page narrative that can be included in your final plan as background for all individuals involved in your organization.
6. **They identify key questions facing the organization.** Hold early discussions with board and staff to identify important issues to address.



***Strategic Planners demonstrate what they know in these ways:***

- The Board of Directors and Executive Director are active participants in the planning effort;
- Consideration has been given regarding the amount of time required to devote to Strategic Planning in light of the organization's current and projected calendar;
- A diverse Planning Team has been formed to lead the process; and
- Consideration has been given to whether an outside professional is needed to help guide the process.



***Strategic Planners produce these documents at the PREPARE stage of planning:***

- Agenda for first Strategic Planning Team meeting
- Roster and contact information for Strategic Planning Committee
- Timeline/Schedule
- Brief Organization History
- List of key questions identified by board and staff

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

- Questions to Ask Before Starting Strategic Planning
- Sample Agenda for First Strategic Planning Committee Meeting
- Strategic Planning FAQ
- Sample Timeline



***These ideas have worked for other Strategic Planners:***

- Look online or ask partner organizations to see their strategic plans. Reviewing some samples can help you decide how you want your strategic plan to look and give you a model to work toward.
- Hold a strategic planning launch where you explain the process you have planned and the roles that board and staff will play. Alternately, create a Joint Sponsorship Letter from the Executive Director and the Board Chair outlining the process and timeline as well opportunities for input. Circle the letter to board, staff and key stakeholders.
- Write down your organization's origin story, if it isn't documented already. How and why did the organization start?
- Learn about organizational life cycles and tailor your planning process to the stage of development that your organization is currently in. Check our bibliography for books that will help you understand common challenges and opportunities associated with each development stage, and factor that information into your planning.

**Congratulations! You're ready for the next stage...LISTEN.**