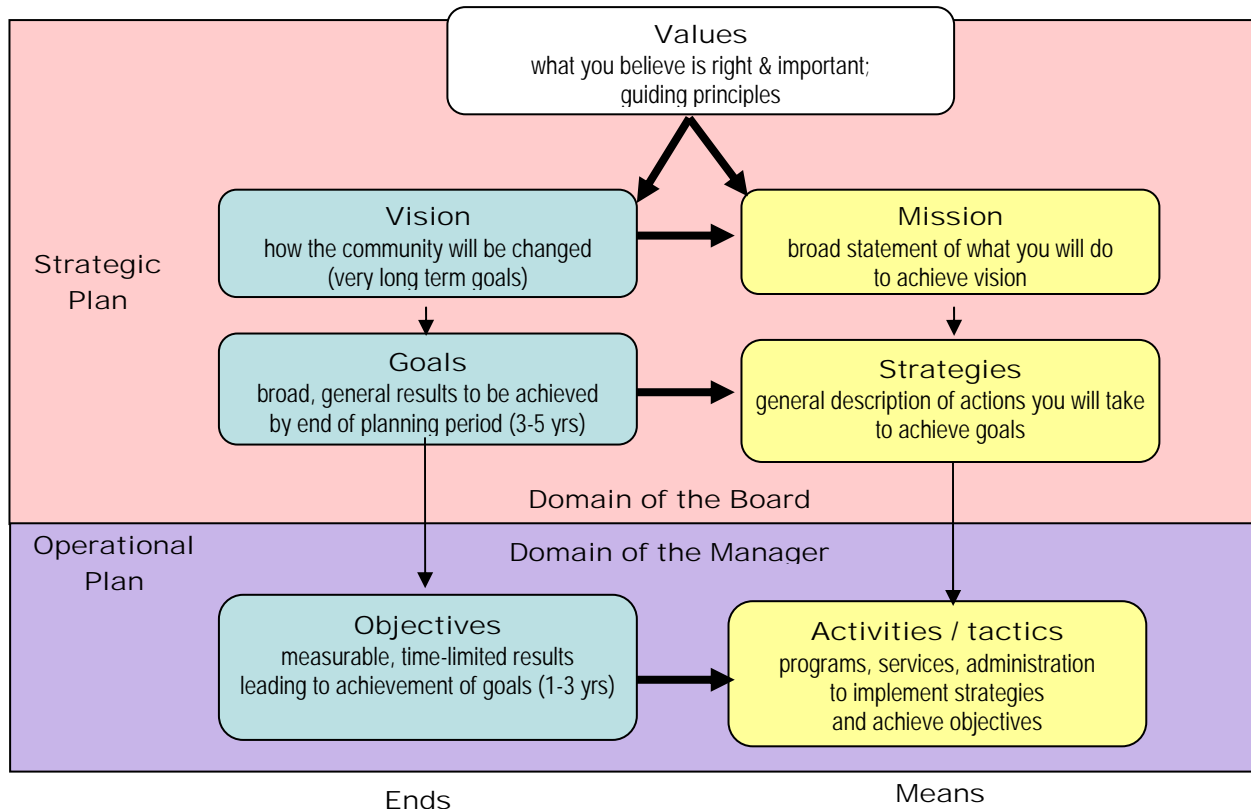


Strategic planning is notable for the lack of standardized methods and terminology in the field. It is therefore useful to establish operational definitions for terms used in the planning process and to be clear about what elements are included in the strategic plan. This help-sheet describes the strategic planning model developed by Nathan Garber & Associates to help clarify the roles of the board and the management.

Strategic Planning Model



The board's role derives from its responsibility for overall governance of the organization and the recognition that board members are volunteers with limited knowledge of the operations of the organization. In the planning process, the board is responsible for clarifying organizational values, defining the vision and mission of the organization as a whole, setting medium-to-long-range goals for the organization, and selecting strategies that will enable the organization to achieve its goals while remaining faithful to the beliefs and principles that guide organizational behaviours. The role of management is to develop shorter term objectives and operationalize the strategies. This process, which includes developing annual objectives, budgets, service plans, and performance measures can be called operational planning.

Strategic Planning Terminology

- *Strategic planning* is a process for clarifying the aspirations of your Board and senior management. It establishes goals to be met by Board and senior staff, and identifies broad strategies to achieve the goals. Strategic planning, as carried out by the Board of Directors, is different from the strategic and operational planning carried out by staff. Its focus is broad organizational goals and strategies rather than specific program and service goals. The Board's strategic plan is intended to convey the board's expectations and priorities to board members and staff. The plan indicates which strategies will be implemented by the board and which by staff.
- Everything that happens in an organization is driven by the organization's *values*. These are the principles and beliefs that explain why the organization exists. Values define the goals and boundaries of behaviour for board, staff, and volunteers in their interactions with each other, with clients, and with the community.
- The vision is a picture of the future state of the beneficiaries your services as a result of your work. Some organizations call this their external vision and have an internal vision statement to describe the future state of the organization.
- The mission is a brief summary of the means that the organization will employ to achieve its vision.
- Goals are statements of the outcomes that the organization intends to achieve at some time in the future. They can be long range or timed to be completed by the end of the time frame chosen for the strategic plan.
- Strategies are activities or groups of activities leading to the attainment of goals. Strategies may sometimes need to be revised during the period covered by the plan because of changing conditions.
- Success indicators are targets, measures, outcomes or achievements that indicate that a goal has been achieved or that progress has occurred.
- Objectives are more specific statements of outcomes than goal statements. Objectives should be observable, measurable and achievable within the time period covered by the strategic plan.
- Activities/Tactics are the programs, projects, actions, or services that will allow you to meet your objectives.

Strategic Planning Process

- Normally, the planning process begins by gathering information about the organization and its environment through discussion, interviews, focus groups, or other research methods. This information is used to identify the critical issues the organization will need to address in the next 3-5 years.
- With this knowledge, the board creates or reviews
 1. organizational values
 2. vision statement
 3. mission statement
- The next step is to develop the goals the organization will achieve by the end of the planning period and the broad strategies it will employ to achieve them. Performance indicators are identified for each goal and strategy.
- In most organizations, the executive director and staff develop the annual objectives and tactics related to programs and services of the organization. The board develops annual objectives and tactics related to its governance goals. Depending upon the organization, the board, staff, or both may develop strategic objectives and tactics for fundraising.
- As the plan is implemented the board monitors the performance indicators so goals, strategies, objectives, and tactics adapt to unforeseen events, and changes in the organization and environment. In this way, the organization can continue to operate strategically.