



Strategic Planning Best Practices Applied by The Alford Group

What is strategic planning and why is it needed?

Strategic planning is the process that organizations go through to articulate the vision and mission for the organization, identify opportunities and challenges for growth, and develop the goals, strategies and action steps to take the organization to the next level. Strategic planning is needed to achieve transformational growth. With effective, thoughtful strategic planning, organizations can increase their fundraising dollars, expand their community impact, and make a greater difference in more people's lives.

What are the outcomes of strategic planning?

The outcomes of strategic planning include, but are not limited to:

- A reaffirmed mission and vision
- Greater engagement from current and new audiences
- Heightened awareness of the organization
- Increased motivation among staff and volunteers
- A clear path forward to transform and grow the organization

What are components of the strategic planning process?

Effective strategic planning processes will have the following components:

Component	Description
Oversight Committee	A core team of staff leadership and key board members/volunteers who oversee and drive the process. This group will often begin with a visioning session to align the process with the organization's needs.
Interviews	Confidential, one-on-one interviews with key stakeholders, such as staff, board members, major donors or fund holders, volunteers, community leaders and other partners. The number of interviews and identification of interviewees is unique to each organization and process.
Additional stakeholder engagement	Methods to involve a wide range of important stakeholders, such as surveys, roundtables or focus groups.
Workgroup session	A session near the end of the process that convenes the Oversight Committee and possibly other key stakeholders to develop actionable steps, tactics and resources, and evaluation measures stemming from the identified strategies and objectives.



What are the terms and elements included in a strategic plan?

- **Mission Statement:** The mission statement clarifies the essence of organizational existence. It describes the needs the organization was created to fill and answers the basic question of why the organization exists. Every organization needs to define its fundamental purpose, philosophy and values.
- **Vision Statement:** An aspirational statement that articulates what the organization wants to become in three to five years. The entire plan will be based on this over-arching vision statement.
- **Organizational Objectives:** Goals articulating the organization's solutions to key challenges and defining what the organization will achieve in the next three to five years related to these objectives.
- **Strategies:** Broad plans for how the organization will achieve its objectives.
- **Action Steps:** Descriptions of activities that will be undertaken in pursuit of the strategies.
- **Responsible Parties:** Staff and/or volunteer leadership accountable for implementing the action steps and monitoring their success.
- **Timelines:** Specific milestones by which various action steps will be started or completed.
- **Targets:** Specific, quantifiable annual (or quarterly) goals directly attributable to completion of an action step.
- **Metrics:** Measures (number, percentage, etc.) used to track and quantify progress against organizational objectives, social outcomes, and targets.
- **Financial Implications:** Additional resources needed to undertake each action step.

