

A wholistic, thoughtful and transparent strategic planning process can take up to 15 months. Once you evolve through the self-reflection stage within the governing body of the organization (board, leadership, staff) what do we do first?

- Review and analyze internal documents and processes

Including: Bylaws, Governing Documents, Committee Governing Documents, Committee Policies and Procedures, internally generated meeting packets and meeting agendas, historical documents

- Key questions:
 - Are the documents up to date?
 - Are we registered with the necessary entities, i.e. local, state and federal?
 - When is the last time we updated them to reflect the reality of our operation?
 - Do our operating documents reflect current best practices in the field?

- Evaluate both organizational and structural capital

Including: Board and Committee functions

- Key questions:
 - Is there a mechanism to ensure rotation of board and committee leaders?
 - Do we have time limits on board members?
 - Do we have enough/too many board members?
 - Does our board contain a variety of skillsets and expertise?
 - Are the roles for members clearly defined?
 - Does our board understand their governance role?

Including: Staffing

- Key questions:
 - Do we have staff in the right role?
 - Are we empowering our staff for their best work?
 - What's the culture?

- Evaluate Organizational Model(s) and Program(s) currently utilized

Including: All programs

- Evaluate your revenue sources

Including: Fundraising plan, fundraising activities, Donor base

- Outreach, data collection and analysis

Including: Board, staff, partners, stakeholders, community members, public/private sector

- Conduct SWOT analysis with Board of Trustees; establish the value proposition
- In-person strategic planning sessions with Board of Trustees; confirm or adjust vision and mission
- In-person strategic planning sessions with Staff; align staff with board direction, create workplan