



How is strategic planning done?

If this is the first time your organisation has undertaken a strategic planning process, make sure that the purpose of the exercise is communicated to the whole organisation and that there is support from everyone who is going to be involved in the process. People have different views and experiences of planning - some believe that it is a waste of time and will not be useful; others will be positive. It can also be useful to talk to other organisations and ask if they will share their plan and process so you can see how they have approached the task.

Be clear about the process you want to use: who will be consulted and when, who will 'lead' the process, how long will it take (set a target end date) and ensure everyone involved is happy with the process and timeframe.

Who should be involved?

Who to involve will depend on the size and type of your organisation. For larger organisations a working party with representatives from different areas of the organisation might be the way to go. For new, small organisations everyone might be involved. Most organisations involve staff, trustees, volunteers and occasionally service users.

Once it has been decided who is to be involved and how (e.g. a working group), it is important to communicate the purpose, timeframe and consultation process to the organisation as a whole so everyone understands what is going on.

It can be useful to ensure that one person has responsibility for managing the process so that deadlines are met.

Be clear about who makes the final decision about the content of the strategic plan - usually this will be the board of trustees.

The strategic planning process can highlight change(s) that are necessary in order for an organisation to move forward. At this stage it is useful for the people who are leading the process to think about how to prepare the organisation for change and deal with any resistance to change that might come up.

Senior staff and trustee commitment to the planning process is essential. A message to the whole organisation outlining the purpose, timeframe, and support of senior staff and trustees can be helpful in establishing the importance of this strategic planning project.