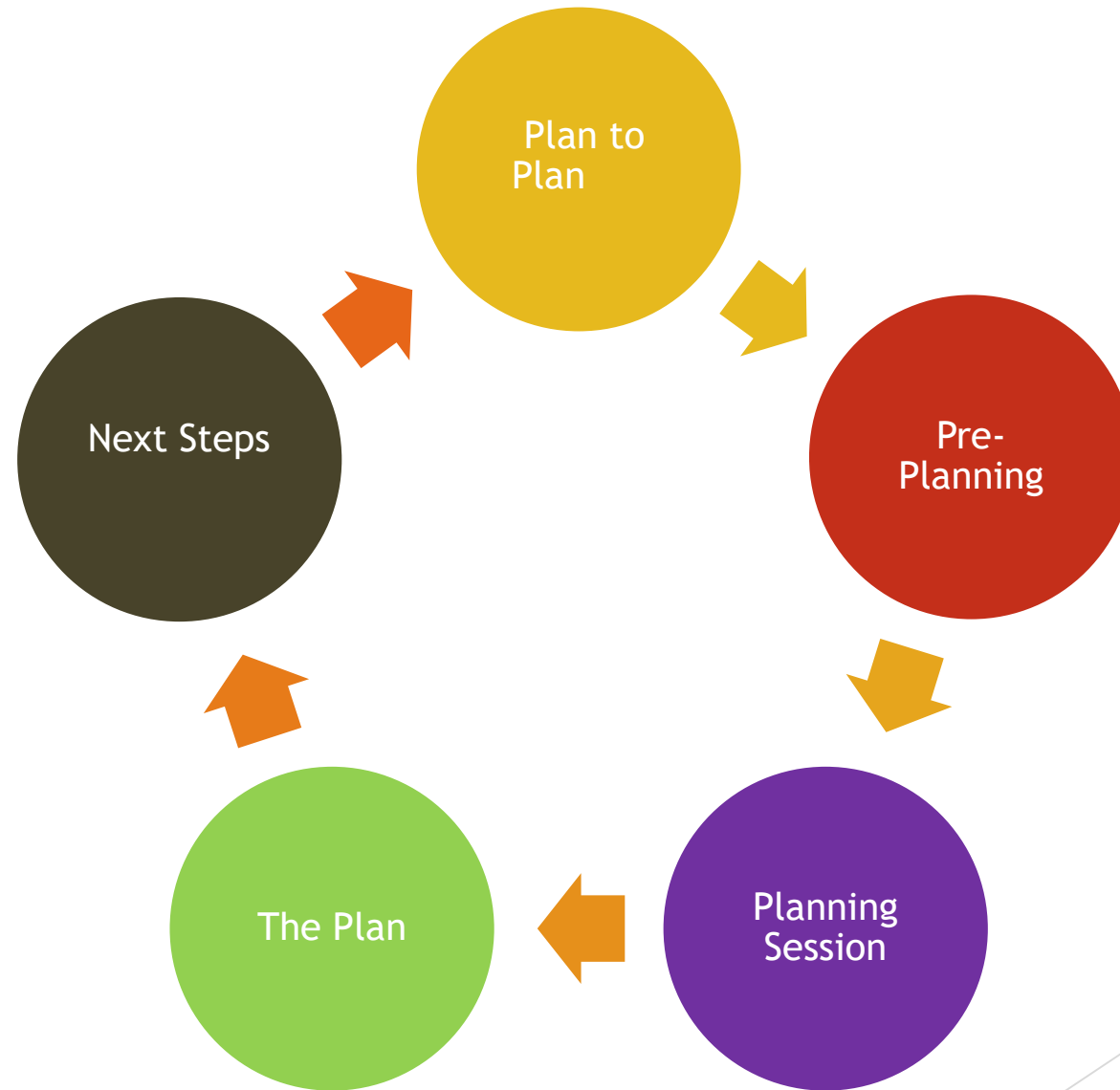


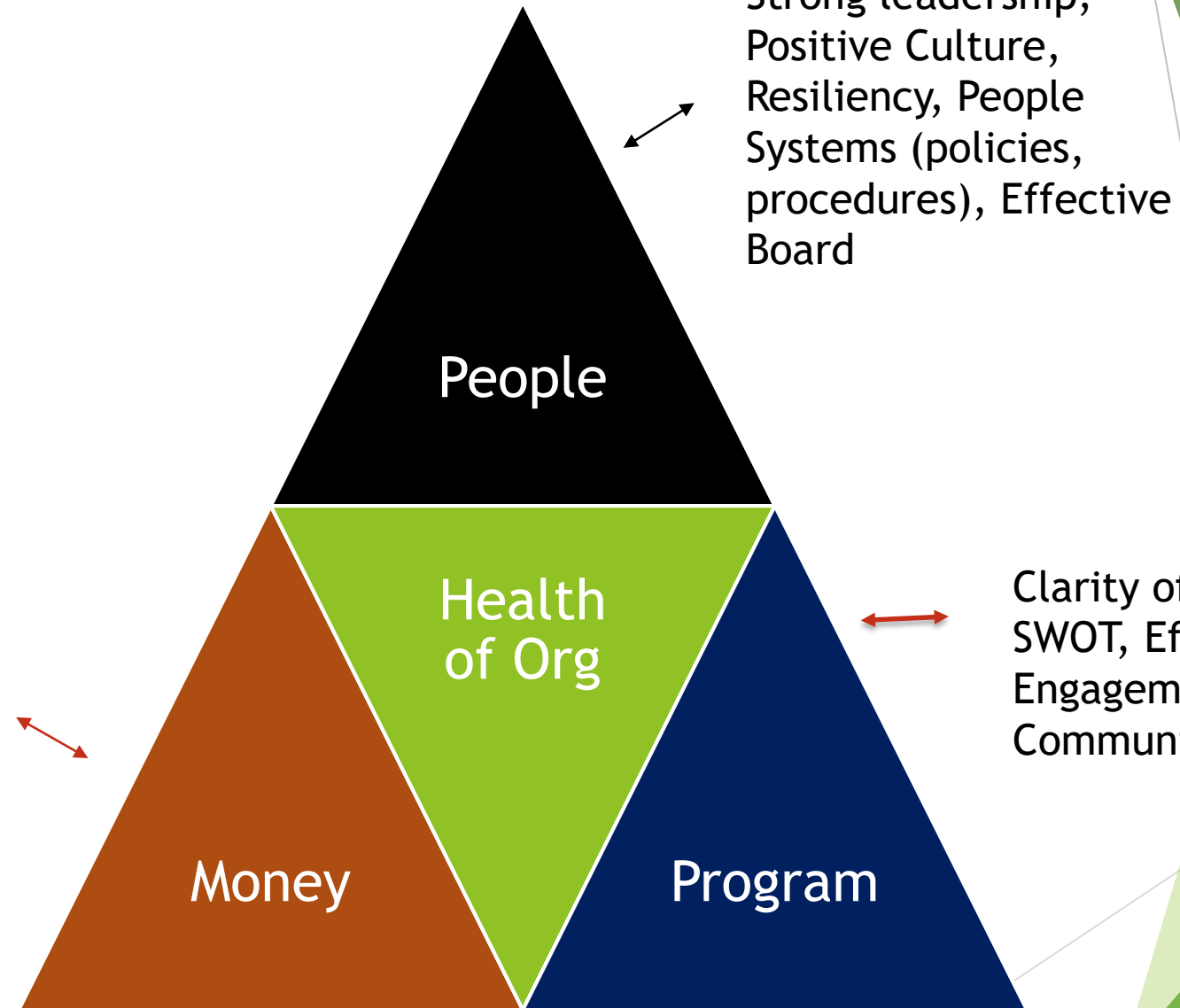
Strategic Planning

A Five Step Process

Strategic Planning Process



Sustainable Programs,
Financial Reserves,
Diversified Income
Sources, Fundraising
Team



Step One: Plan to Plan

Key Outcome: Leaders are invested in conducting the planning process

GOOD ENOUGH

- ▶ Identify a planning champion who will recruit members to a planning committee
- ▶ Organize and conduct an initial planning committee phone conference to plan the process.
- ▶ Create a timeline



What's
the
plan?

WHOLE ENCHILADA

- ▶ Identify a planning champion
- ▶ Find and recruit members of a diverse and committed planning committee
- ▶ Clarify Board, staff roles - get agreement on rules of engagement
- ▶ Identify specific issues or choices the planning process should address
- ▶ Discuss the need for creating or updating vision and mission statements
- ▶ Estimate resources needed and create a planning timeline

Step Two: Pre-Planning Phase

Key Outcome: The organization solicits input to avoid being myopic

GOOD ENOUGH

- ▶ Review prior plans vision/mission statements
- ▶ Review budgets, fundraising needs, income-expense by program area
- ▶ Pull together a group of staff, board and key stakeholders to get input on org SWOT.
- ▶ Summarize key findings

WHOLE ENCHILADA

- ▶ Review prior plans, vision/mission statements
- ▶ Review budgets, fundraising scenarios and income-expense by program area
- ▶ Conduct a pre-planning survey to determine how organization is perceived by staff, Board, key stakeholders, external constituents and funders
- ▶ Provide a summary of finding of survey to the org via written report and/or in person presentation
- ▶ Identify potential funding gaps and consider areas to focus on in the planning process
- ▶ Design a strategic planning session; develop the agenda
- ▶ Attain agreement from committee on session outcomes and objectives

Step Three: Planning Session

Key Outcome: Focused ambitious achievable 3-year goals are identified.

GOOD ENOUGH

- ▶ Conduct a day-long session to confirm or adapt vision statement, identify strategic initiatives and significant 3-year goals
- ▶ Review organization's funding scenarios, best and works case, to make sure funding available meets needs.
- ▶ Summarize key decisions
- ▶ Evaluate session
- ▶

WHOLE ENCHILADA

- Conduct a retreat session with staff/board
- Review findings from surveys
- Review and revise mission/vision statements
- Determine priorities for strategic initiatives or program areas (core/non-core)
- Conduct mini-SWOT for key program areas
- Determine key goals for next 3 years for each program area and organization operations.
- Estimate costs (staffing, etc) to achieve these goals)
- Review funding by program to make sure funding available to meet needs
- Evaluate Session

Step Four: The Plan

Key Outcome: A plan is developed that represents the organization's best thinking.

GOOD ENOUGH

- Results of the planning session are compiled into a plan.
- The strategic plan is outcome focused and the outcomes within the program plans ties directly to the overall vision and mission statements

WHOLE ENCHILADA

- After the planning session, the committee compiles a draft plan.
- The plan includes goals, plans outcomes for each strategic initiative
- Costs are outlined for all programs
- Funding gaps are clearly identified
- Programs are mapped - core and funded, core and not-funded, non-core and funded, or non-core and not funded.
- The plan includes measurable benchmarks and lays out a plan for evaluating results.

Step Five: Next Steps

Key Outcome: Putting your strategic plan to work

GOOD ENOUGH

- Distribute SP to key stakeholder and funders.
- Develop staff workplans that move towards objectives outlined in the plan
- Formulate annual fundraising plan and budget
- Create or revise fundraising “elevator statement” and other communications materials
- Plan to have annual retreat to review plan in depth

WHOLE ENCHILADA

- Board approves plan and it is distributed to stakeholders and funders.
- Develop annual operating plan (AOP) that reflects the objectives of the first year of the overall plan
- Create and annual fundraising plan and budget
- Staff develop quarterly work plans
- Create or revise org Case for Support
- Revisit plan monthly at Board meetings
- Facilitate Board review of AOP
- Implement benchmarking and evaluation

Vision: To create and sustain a world-class, multi-use, non-motorized trail (path/corridor) connecting communities across the North Olympic Peninsula while/and serving as a catalyst for community and economic development.

Mission: PTC is a 501 (c) (3) organization whose mission is to promote construction, use and maintenance of a regional non-motorized, multi-use trail on the North Olympic Peninsula.”

GOALS	STRATEGIES	ACTIONS/MEASURES
To broaden and strengthen our visibility as a regional resource that is driving community and economic development.		
To enhance/expand/improve volunteer, member and board experiences.		
To serve as a lead in trail completion among jurisdictions.		

Questions? Comments. More Information?

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