

Best Practices in Strategic Planning

While each organization's strategic plan should be specific to its needs, our research and experience has determined that organizations that follow "best practices" in strategic planning have a greater probability of achieving their objectives. To see how your organization stacks-up against "best practices", consider the following statements.

Best Practice Statement

1. As part of our strategy development process we review the key trends and issues that are going on in our sector and draw potential implications.
2. We understand the government's (municipal, provincial & federal, as appropriate) position and policy with regards to any regulatory issues that may impact our organization.
3. We discuss and understand the implications of changes in our external environment upon our organization.
4. We have identified our key external stakeholders and incorporated their perspective into the strategy development process.
5. We have reviewed and either confirmed and / or amended our organization's mission, vision and values.
6. We understand and agree on the critical issues facing our organization and the barriers to diminishing them.
7. We understand the organization's internal strengths and opportunities for improvement.
8. We understand the external opportunities and threats and the implications upon our organization's future direction.
9. We have determined a few broad areas that if we focus our efforts, will have a meaningfully positive impact upon the future of our organization.
10. We have measures of success in place so that we can monitor our performance during the period of our strategic plan.

11. Our strategic plan has a specific review date.

12. We have established an “action list” that clearly outlines the connection between the strategic and operational plan and we have an individual responsible for each action item to ensure it will be completed within the designated timeframe.

13. The strategic plan is realistic (although challenging) given the resources and capabilities of the organization.

14. The focus of the strategic plan is on answering the question “what should we do?”

15. The focus of the operational (or tactical) plan is on answering the question “how will we do it?”

16. We have a process in place for monitoring our strategic plan and ensuring that it remains relevant.

17. We understand the implications of our strategy upon our organization’s structure, people and processes.

18. Key stakeholders have been provided with sufficient time to engage in meaningful face-to-face discussion regarding the organization’s strategic direction.

19. The strategic plan has the commitment of the organization’s key stakeholders.

20. The strategic plan is a short, concise document that outlines the decisions the organization has made (supporting materials about process, surveys, etc. are included in the appendix).

Using these ‘best practices’ can have a positive impact upon your organization’s future. However, for those of you who may not consider it appropriate to adopt all these “best practices” for your strategic planning at this time, we have found that you can still benefit by having the

Board and Executive Director use these statements as a framework for discussion. The discussion should focus on understanding “why” the organization should or should not include each of these “best practices” in their planning.

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- Charities

- Associations
- Fraternal Benefit Societies
- Educational Institutions
- Government Agencies

Our consulting practice is focused in five core areas critical to the success of any non-profit organization:

- Strategic Management
- Organizational Capacity
- Governance
- Executive Recruitment
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Our approach is as unique as it is dynamic. Not only are we dedicated to delivering the right solution, we're also committed to developing the right process to get there. Ultimately, we're dedicated to growing great non-profits through applied knowledge, which leads to better decision making, improved stakeholder involvement and true success.

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