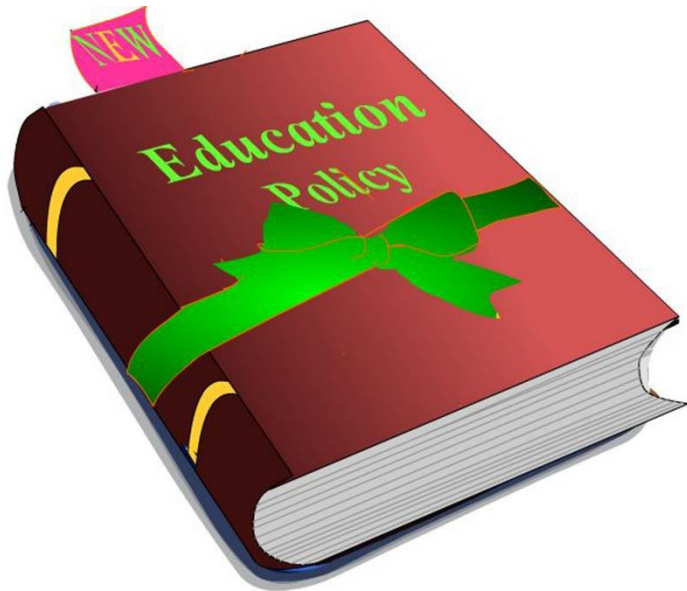




EAD5702 Educational Strategy and Policy Planning



Asst.Prof.Dr. Thada Siththada

Department of Educational Administration, Graduate School, Suan Sunandha Rajabhat University

Email: thada.si@ssru.ac.th

EAD5702 Educational Strategy and Policy Planning

Educational context and trends, principles of policy planning and strategic planning for education, the analysis and development of education policy, and the implementation of such policy and plan, principles, process, and various techniques for strategic planning and action planning for education, administration network for sharing, the study of social evolution and local culture, the planning of local education development in terms of educational resource mobilization, the implementation of plan including the evaluation of education plan implementation for further planning of the increase of educational institution administration efficiency and effectiveness on new normal



EAD5702 Educational Strategy and Policy Planning



Understanding Strategic Planning

A Definition of Strategic Planning

Strategic planning is a management tool for several key purposes: to help an organization do a better job, to focus its energy, to ensure that members are working toward the same goals and to assess and adjust its direction in response to an ever-changing environment. Strategic planning provides the master plan an organization uses to achieve its aims. It charts the direction and goals of the entire organization and all aspects of its operation. In short:

Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future. (Bryson, 1988.)

A Definition of Strategic Planning

In addition, strategic planning does the following: ✓ Shares an organization's vision with a large internal and external audience. ✓ Clarifies and makes the organization's mission specific. The process is strategic because it involves choosing how best to respond to the circumstances of the organization's environment. – Nonprofits must respond to dynamic and sometimes even hostile environments.

- ✓ Identifies clients, consumers and stakeholders served by the organization.

- ✓ Identifies distinctive strengths and weaknesses of the organization.

- ✓ Scans the relevant environment to find emerging opportunities and threats for an organization

A Definition of Strategic Planning

- ✓ Involves the key people inside and outside the organization in the planning process.
 - The process is about planning because it involves intentionally setting goals (choosing a desired future) and developing an approach to achieving those goals.
 - ✓ Creates a context for making choices about possible future directions. – The process is disciplined in that it calls for a certain order and pattern to keep it focused and productive.
 - These choices are fundamental decisions and actions that must be made to reach a desired future. The plan ultimately is no more (and no less) than a set of decisions about what to do, why to do it, and how to do it.

A Definition of Strategic Planning

- ✓ Involves the key people inside and outside the organization in the planning process.
 - The process is about planning because it involves intentionally setting goals (choosing a desired future) and developing an approach to achieving those goals.
- ✓ Creates a context for making choices about possible future directions. – The process is disciplined in that it calls for a certain order and pattern to keep it focused and productive.
 - These choices are fundamental decisions and actions that must be made to reach a desired future. The plan ultimately is no more (and no less) than a set of decisions about what to do, why to do it, and how to do it.

The strategic planning process can be complex and challenging, but by using the basic ideas outlined above, you can develop and execute a successful strategic plan

A Definition of Strategic Planning

Strategic Planning and Long-Range Planning Although many use the terms strategic planning and long-range planning interchangeably, the terms differ in their emphasis on the "assumed" environment. Long-range planning is generally considered to assume current knowledge about future conditions. It looks to ensure the plan's exact results over the duration of its implementation



A Definition of Strategic Planning

LONG-RANGE PLANNING Long-range planning is generally considered to assume current knowledge about future conditions. It looks to ensure the strategic plan's results over the duration of its implementation.

Strategic Thinking and Strategic Management Strategic planning is only useful if it supports strategic thinking and leads to strategic management and, even more importantly, execution. Strategic thinking and subsequent management must result in action.



A Definition of Strategic Planning

Dr. Jagdish Sheth, a respected authority on marketing and strategic planning, provides the following framework for understanding strategic management. He says that it means continually asking the question “Are we doing the right thing?” It entails both attention to the “big picture” and the willingness to adapt to changing circumstances and consists of the following three elements:

- ✓ Formulation of the organization’s future mission in light of changing external factors such as regulation, competition, technology and customers.
- ✓ Development of a competitive strategy to achieve the mission.
- ✓ Creation of an organizational structure which will deploy resources to successfully carry out its competitive strategy. (Sheth, 1985.)



A Definition of Strategic Planning

Strategic management is adaptive and keeps an organization relevant. In these dynamic times, this approach is more likely to succeed than assuming everything is fine just the way that it is.



What Strategic Planning Is Not

Strategic planning is about fundamental decisions and actions, but it does not attempt to make future decisions (Steiner, 1979). Strategic planning involves anticipating the future environment, but the decisions are made in the present. This means that over time, your organization must stay abreast of changes in order to make the best decisions it can at any given point — it must manage, as well as plan, strategically. Strategic planning has also been described as a tool — but it is not a substitute for the exercise of judgment by leadership. Ultimately, the leaders of any enterprise need to sit back and ask themselves “What are the most important issues we should respond to?” and “How shall we respond?” And they must have answers.

What Strategic Planning Is Not

Finally, strategic planning, though disciplined in many respects, does not typically flow smoothly from one step to the next. It is a creative process, and the fresh insight arrived at today might very well cause you to alter the decision made yesterday. Inevitably, the process moves back and forth several times before arriving at the final set of decisions. So, no one should be surprised if the process feels less like a comfortable trip on a commuter train and more like a ride on a roller coaster. But remember, even roller coaster cars arrive at their destination!

Reasons for Strategic Planning

Why should your organization embark on a strategic planning effort?

After all, planning consumes resources and time and takes away from handling the pressures of the moment. Furthermore, defining the direction and activities of an organization's future is a daunting endeavor. Despite the magnitude of the task, however, there are many compelling reasons for taking on the challenge.



Reasons for Strategic Planning

The process of strategic planning can lead to:

- ✓ Creating a forum for understanding why the organization exists and the values that should influence decisions.
- ✓ Defining a shared vision of the organization's future that can guide the current allocation of scarce resources — which is not to predict the future, but to define the organization's preferred future and establish a perspective that will guide current decisions.



Reasons for Strategic Planning

The process of strategic planning can lead to:

- ✓ Fostering successful communication and building teamwork among the board of directors, staff and external constituencies.
- ✓ Laying the groundwork for meaningful change by stimulating forward thinking and focusing attention on what is really important to the organization's long-term success



Reasons for Strategic Planning

Participation in the process makes for a better-informed staff and board and empowers them to be more effective leaders, managers and decision makers. And they end up with a planning document that they can use to effectively manage the organization. Between the planning process and the realization of a final written plan, a number of tangible benefits can emerge:

- ✓ **An explicit understanding of the organization's purpose, mission and values among staff, board and external constituents, with that understanding supporting an increased level of commitment to the organization and its goals.**
- ✓ **A framework that guides and supports the governance of the organization and orients board and staff toward more strategic thinking and strategic management.**

Reasons for Strategic Planning

Participation in the process makes for a better-informed staff and board and empowers them to be more effective leaders, managers and decision makers. And they end up with a planning document that they can use to effectively manage the organization. Between the planning process and the realization of a final written plan, a number of tangible benefits can emerge:

- ✓ **A means of monitoring achievements and measuring results.**
- ✓ **A blueprint for action.**
- ✓ **Improved services for clients.**
- ✓ **Information that can be used to “market” your organization to the public and potential funders.**

The Strategic Planning Process

There are five fundamental steps in the planning process. These steps are a recommendation, but they are not the only recipe for cooking up a strategic plan. Thoughtful and creative planners will add spice to the mix or elegance to the presentation to develop a strategic plan that best suits their organization.

The Strategic Planning Process

Step 1: Getting Ready To prepare for strategic planning, your organization must first assess if it's ready. While a number of issues must be addressed in assessing readiness, that determination essentially comes down to whether your organization's leaders are truly committed to the effort and whether they are able to devote the necessary attention to the "big picture." For example, when a funding crisis looms, or the founder is about to depart, or the environment is so turbulent that everyone is putting out fires, it may not make sense to take time out for a strategic planning effort



The Strategic Planning Process

Once you determine that your organization is indeed ready to begin strategic planning, you must then do four things to pave the way for an organized process:

- ✓ Identify the specific issues or choices that the planning process should address.
- ✓ Clarify roles (who does what in the process).
- ✓ Create a planning committee to develop an organizational profile.
- ✓ Identify the information that must be collected to help make sound decisions



The Strategic Planning Process

The product developed at the end of Step 1 is called a work plan. (Depending on the size of your organization, this part of the process can involve many key individuals. It can be shortened, however, if your organization has only a handful of staff that will need to provide input.)



The Strategic Planning Process

Step 2: Developing the Mission and Vision Statements A mission statement is like an introductory paragraph: It must communicate the essence of your organization. An organization's ability to articulate this indicates its focus and purposefulness. A mission statement typically describes an organization in terms of:

- ✓ **Purpose:** Why the organization exists and what it seeks to accomplish.
- ✓ **Business:** The main method or activity through which the organization tries to fulfill this purpose.
- ✓ **Values:** The principles or belief system that guides an organization's members as they pursue the organization's purpose.



The Strategic Planning Process

Whereas the mission statement summarizes the what, how and why of an organization's work, a vision statement presents an image of what success will "look like." For example the mission statement and vision statement of one organization are as follows:

Mission: The mission of the Support Centers of America is to increase the effectiveness of the nonprofit sector by providing management consulting, training and research.

Vision: Our guiding principles are to promote client independence, expand cultural proficiency, collaborate with others, ensure our own competence and act as one organization.



The Strategic Planning Process

From these statements, we can see that the group envisions an ever-increasing global movement to restore and revitalize the quality of life in local communities. The Support Centers of America wants to be a recognized contributor and leader in that movement. With mission and vision statements in hand, this organization has taken an important step toward creating a shared, coherent idea of what it is strategically planning for



The Strategic Planning Process

The products developed at the end of Step 2 are a draft mission statement and a draft vision statement. (This step can be very complex for a larger organization with multiple stakeholders. Smaller organizations will be able to come to agreement on a mission more readily.)



The Strategic Planning Process

MISSION STATEMENT A mission statement reflects the essence of an organization's intent and tells when, where and how it will fulfill its purpose.

VISION STATEMENT A descriptive sentence that presents a broad image of what success will "look like" for a nonprofit organization.



The Strategic Planning Process

Step 3: Environmental Assessment Once your organization has clarified why it exists and what it does, it must take a clear-eyed look at its current situation. Remember that part of strategic planning, thinking and management is an awareness of available resources and an eye to the future environment so that your organization can successfully respond to change.



The Strategic Planning Process

This step is about gathering up-to-date information about your organization's strengths, weaknesses, opportunities, threats and performance — assessments that will highlight the critical issues that your organization faces and that its strategic plan must address.

These could include a variety of primary concerns, such as funding, new program opportunities, changing regulations or changing needs in the client population; the point is to choose the most important issues to address. Typically a planning committee will agree on no more than ten critical issues around which to organize the strategic plan



The Strategic Planning Process

ENVIRONMENTAL ASSESSMENT The process of gathering and analyzing the information needed to make an evaluation of your organization in its environment. The environmental assessment includes the following activities:

- ✓ Collecting internal and external stakeholders' perceptions about the organization.
- ✓ Evaluating programs' impact on clients.
- ✓ Evaluating programs through a cost/ benefit analysis.
- ✓ Analyzing programs through a competitive analysis.
- ✓ Defining previous implied strategies.



The Strategic Planning Process

The products that result from Step 3 are a “database” of concrete information that can be used to make decisions and a list of critical issues that demand a response from the organization — the most important issues that the organization needs to address.



The Strategic Planning Process



Step 4: Developing Strategies, Goals and Objectives
Once you have affirmed your organization's mission and identified its critical issues, it is time to figure out what to do about them: the broad approaches to be taken (strategies), and the general and specific results to be sought (the goals and objectives). Strategies, goals and objectives may come from individual inspiration, group discussion or formal decision-making techniques — but in the end the leadership agrees on how to address the critical issues

The Strategic Planning Process



This can take considerable time and flexibility: Discussions at this stage frequently require additional information or a reevaluation of conclusions reached during the environmental assessment. It is even possible that new insights will emerge that change the thrust of the mission statement. To create the best possible plan it is important that planners not be afraid of going back to an earlier step in the process to take advantage of newly available information.

The Strategic Planning Process



The product of Step 4 is an outline of the organization's strategic directions — the general strategies, long-range goals and specific objectives of its response to critical issues

The Strategic Planning Process



STRATEGY: A strategy is a coordinated approach or direction adopted by an organization in response to a critical issue and/or goal.

GOALS: Goals are described in a broad outcome statement that guides a program or management function.

OBJECTIVE An objective is a precise, measurable, time phased result that supports the achievement of a goal.

The Strategic Planning Process

Step 5: Completing the Written Plan You've articulated the mission, identified the critical issues, and agreed upon the strategies — so Step 5 essentially involves putting all that down on paper. Usually one member of the planning committee, the executive director, or even a planning consultant can draft a final plan document and then submit it for review by all key decision makers (usually the board and top staff).



The Strategic Planning Process



This is also the time to consult with top staff to determine how the document will be translated into operating plans (the detailed action plans for accomplishing the goals proposed by the strategic plan). This important action ensures that the plan addresses key questions about priorities and directions in sufficient detail to serve as a guide.

The Strategic Planning Process



Revisions should not be dragged out for months, but action should be taken to answer any important questions that are raised. It would certainly be a mistake to ignore serious disagreement at this step just to wrap up the process more quickly.

The Strategic Planning Process

The end result will be a concise description of where the organization is going, how it should get there and why it needs to go that way — ideas that are widely supported by the organization's staff and board. The product of Step 5 is the Strategic Plan.



The Strategic Planning Process



Step 1: Getting ready; initiating the planning process Results in a work plan.

Step 2: Developing a mission and vision Results in a mission statement.

Step 3: Conducting an environmental assessment Results in a resource database of information.

Step 4: Developing strategies, goals and objectives Results in an outline of strategic directions.

Step 5: Writing the strategic plan Results in a strategic plan.

Initiating The Planning Process



Purpose: In this unit we examine the basic elements of initiating the strategic planning process and how to prepare for it. It discusses setting the stage for participation among key stakeholders and developing a general direction for the organization's future.

Initiating The Planning Process



Strategic planning is a good idea, but it is only worthwhile in practice if the organization is ready and the right people in the organization believe in it and are committed to achieving it. (A good definition for commitment, by the way, is unwavering perseverance and emotionally impelled direction.)

Initiating The Planning Process



The outlines requirements for successful planning, as well as potential pitfalls to avoid. Most important is the requirement of a strong commitment to the planning process by the executive director and board leadership. Top leadership must spend significant time and energy on the process or it will never get off the ground. In other words, regardless of how much an organization “needs” to do strategic planning, a program manager or board member will not be able to initiate a planning process alone, or see that it happens successfully

Initiating The Planning Process

This does not mean that a visionary on the staff or board has no opportunity to initiate a strategic planning process.

One person can be the catalyst to start the process. Such an individual must, however, actively recruit support from leaders by identifying the potential benefits to the organization and helping key stakeholders see the need for planning.



Initiating The Planning Process

For example: Is the staff confused about how their programs relate to each other? Does the board shy away from seeking community support for the organization? Is it unclear what the organization has accomplished and how to measure the success of its efforts? If the answer to these kinds of questions is "yes," then a compelling case can be made to management for doing strategic planning. This important up-front homework is essential because it will pay off down the line with board and staff commitment to the process.



Initiating The Planning Process

The strategic planning process is part of a board-staff partnership. The reason both groups need to be involved is that strategic planning is at the intersection of governance (the board's role) and management (the staff's role). Whoever initiates the strategic planning process must recognize that its success lies in getting involvement from all parts of the organization.



Initiating The Planning Process

The executive director and board president need to assess the organization's readiness and be clear about what they would like the planning process to accomplish. If it makes sense to go forward, then proceed by forming a planning committee



The Strategic Planning Process



Step 1: Getting ready; initiating the planning process Results in a work plan.

Step 2: Developing a mission and vision
Results in a mission statement.

Step 3: Conducting an environmental assessment
Results in a resource database of information.

Step 4: Developing strategies, goals and objectives
Results in an outline of strategic directions.

Step 5: Writing the strategic plan
Results in a strategic plan.

Step 1: Getting ready; initiating the planning process Results in a work plan.



Perhaps the best way to start the process of strategic planning is by establishing some context for the effort — if your organization is considering doing such planning, there are probably some underlying reasons and hoped-for outcomes. This is not a formal evaluation, but simply a way to “get a handle on” the concerns and expectations that paint a picture of this effort at the outset

Step 1: Getting ready; initiating the planning process Results in a work plan.



Strategic Planning Readiness Criteria.

- ✓ Commitment and support from top leadership, especially the executive director and board president, to see the project through to the end.
- ✓ Clear roles and expectations for all participants in the planning process, including clarity as to who will contribute input to the plan and who will be the decision makers.
- ✓ Access to relevant information for assessing the organization (sufficient market research) and willingness to recognize and respond to the organization's internal and external environment (strengths, weaknesses, opportunities and threats).
- ✓ At least one strategic thinker and at least one realist, willingness to be inclusive and encourage broad participation so that people feel ownership of and energized by the process

Step 1: Getting ready; initiating the planning process Results in a work plan.



- ✓ An adequate commitment of organizational resources to complete the planning process as designed, for example, staff time, board time and dollars to spend on the process (market research, consultants).
- ✓ A board and staff that understand the purpose of planning, realize what it is and is not able to accomplish, and have reached consensus about the desired outcomes of the planning process.
- ✓ A true commitment to assessing current programs and to meeting current and future client needs.
- ✓ A willingness to question the status quo and to look at new ways of doing and evaluating things.
- ✓ Good working relationships and an ability to work through conflicts among key players.

Step 1: Getting ready; initiating the planning process Results in a work plan.



A. Planning Process

Considerations As with any major effort, a strategic planning process has its proper time and place in the life of an organization. Certain conditions and criteria must exist (and others must not) if strategic planning is to be a creative, collaborative, successful endeavor — so it is important to be honest when analyzing your organization's readiness to plan

Step 1: Getting ready; initiating the planning process Results in a work plan.



The planning readiness criteria outlined above are the ideal elements your organization should have in place before committing to a strategic planning process. But when considering such an effort, the pitfalls to be avoided are equally important. If you recognize your organization in any of the symptoms below, step back and rethink the feasibility of a strategic planning endeavor at this point in time

Step 1: Getting ready; initiating the planning process Results in a work plan.



If many of the pitfalls presented below are present, then an in-depth strategic planning process may not be appropriate at this time. Even if your organization is halfway through the planning process before realizing that it isn't really ready to plan, you should stop right there and address the barriers to strategic planning before continuing with the process

Step 1: Getting ready; initiating the planning process Results in a work plan.

Strategic Planning Pitfalls

- ✓ Too much formality or rigidity in the planning process so that it lacks simplicity and restrains creativity.
- ✓ Top management that assumes that strategic planning is something separate from the entire management process.
- ✓ Top management that assumes that it can completely delegate the planning function to a planner.
- ✓ Top management so engrossed in current problems (such as a financial crisis or other extreme circumstance) that it has neither the time nor the leeway to look far enough ahead to plan for the future.

Step 1: Getting ready; initiating the planning process Results in a work plan.

Strategic Planning Pitfalls

- ✓ Top management's tendency to reject the decisions made during the planning process in favor of its own intuitive decisions.
- ✓ Failure to involve line staff and members of the board in the planning process.
- ✓ Failure of top management to include department and division heads in developing plans for their departments.
- ✓ Failure to articulate constraints and non-negotiables up front.
- ✓ Failure to create an organizational climate that is receptive to planning and change.

Step 1: Getting ready; initiating the planning process *Results in a work plan.*

B. Prior Experience

In addition to assessing current circumstances, it is useful to assess past efforts at planning and apply lessons learned. If an organization's previous planning processes were successful, then it will want to try to duplicate that success by using similar processes this time around. But if prior planning efforts have not worked well, or the plans that resulted from prior efforts were not followed, then you need to spend some time figuring out why this is so and what changes might benefit future planning efforts. If the management team of your organization has been in place for a few years, there should be a number of staff around who can play the role of historian to give this effort more credibility

Step 1: Getting ready; initiating the planning process *Results in a work plan.*

C. Participation

in the Planning Process Strategic planning should be an inclusive effort that engages key stakeholders at appropriate stages. Who are stakeholders? Anyone who cares, or should care, about the organization and anyone who has a “stake” in the success or failure of its mission is a stakeholder. This encompasses those who must implement the strategic plan, those who benefit from its implementation and those who could significantly help or hinder its implementation, such as board members, staff (part-time and full-time, salaried and volunteer, current and previous), funders (existing, potential), clients (existing, past, potential), community leaders, competitors, potential collaborators and other agencies in parallel or related fields

Step 1: Getting ready; initiating the planning process Results in a work plan.

Part of the thought and creativity of the strategic planning process is identifying those individuals and groups that traditionally might not be regarded as “key” stakeholders, but who might contribute unique and valuable perspectives. It is important to include this range of participants because a truly inclusive process achieves the following:

✓ Helps build internal and external enthusiasm for and commitment to the organization and its strategies — those who feel they have contributed to the planning process then feel invested in it and are more likely to take ownership of the organization’s goals and efforts.

Step 1: Getting ready; initiating the planning process *Results in a work plan.*

Part of the thought and creativity of the strategic planning process is identifying those individuals and groups that traditionally might not be regarded as “key” stakeholders, but who might contribute unique and valuable perspectives. It is important to include this range of participants because a truly inclusive process achieves the following:

- ✓ **Adds objectivity to the process — “outsiders” can identify jargon or ask critical questions about issues that “insiders” might assume are common knowledge or simply take for granted.**
- ✓ **Develops foundations for future working relationships.**
- ✓ **Establishes a continual information exchange among staff, management, clients and other key stakeholders.**
- ✓ **Ensures an adequate depth and breadth of data from which to make informed decisions.**

Step 1: Getting ready; initiating the planning process Results in a work plan.

D. Stakeholders' Roles in Planning

Determining how to include all these stakeholders can prove even more challenging than identifying who they are, as there are many different kinds and levels of participation in the strategic planning process:

- ✓ **Leadership: Taking the initiative to see that decisions get made and things get done.**
- ✓ **Facilitation: Paying attention to process rather than content (a role played, for example, by an outside consultant or neutral participant).**
- ✓ **Input: Providing information and opinions.**
- ✓ **Decision-making: Using that information and those opinions to establish strategies and goals**

Step 1: Getting ready; initiating the planning process Results in a work plan.



It is especially important to delineate between those stakeholders who provide input and those who make decisions. Being asked for an opinion is not the same as having a final say in related decisions, but stakeholders sometimes lose sight of that distinction. It is the responsibility of those who make the decisions to build a framework and process for letting participants know their roles and what will be done with their input and opinions.

Step 1: Getting ready; initiating the planning process *Results in a work plan.*

The nature of stakeholders' participation will depend on any number of factors — size, “culture” and management style, range of constituents and breadth of services. Below are some general descriptions of specific stakeholders' roles in the strategic planning process.

✓ **Executive Director.** The executive director is usually the chief planner and prime “mover” of the plan through the entire process. He or she works closely with the chair of the planning committee and often serves as the prime liaison between the staff and the planning committee. Sometimes the executive director also writes the strategic plan, but may delegate that responsibility to someone else. Finally, the executive director plays a crucial role in that he or she is ultimately responsible for the implementation of the plan.

Step 1: Getting ready; initiating the planning process *Results in a work plan.*

The nature of stakeholders' participation will depend on any number of factors — size, “culture” and management style, range of constituents and breadth of services. Below are some general descriptions of specific stakeholders' roles in the strategic planning process.

✓ **Board of Directors.** In its governance capacity, one of the board's primary responsibilities is planning — ensuring a good planning process is in place, contributing a visionary, big-picture perspective to the process and approving the final plan. The board should provide input for the mission, vision, values and environmental assessment aspects of the plan. The board might also be involved in strategy discussions, setting long-term program and administrative priorities and setting goals for itself.

Step 1: Getting ready; initiating the planning process Results in a work plan.

The nature of stakeholders' participation will depend on any number of factors — size, “culture” and management style, range of constituents and breadth of services. Below are some general descriptions of specific stakeholders' roles in the strategic planning process.

✓ **Staff.** Paid and volunteer staffs have programmatic expertise and familiarity with the field and clients, which are vital to shaping a relevant and workable strategic plan. Their involvement not only ensures “buy-in” to the organizational goals and strategies, but is the link between the vision described in the plan and the realization of that vision on a day-to-day basis. Some staff might also be asked to collect data (market research) and evaluate programs. Program managers should have input into setting long-term program objectives and should assist in developing operational plans. Ideally, staff should be represented on the planning committee

Step 1: Getting ready; initiating the planning process *Results in a work plan.*

The nature of stakeholders' participation will depend on any number of factors — size, “culture” and management style, range of constituents and breadth of services. Below are some general descriptions of specific stakeholders' roles in the strategic planning process.

✓ **Clients.** The sole reason for most nonprofits' existence is the betterment of society, whether that means enriching cultural life, feeding the hungry or increasing the quality of life of people with AIDS. In a planning process then, it is critical to evaluate what kind of job the organization is and should be doing in this regard. Directly involving past and present clients in the planning process and soliciting accounts of their unique first-hand experience with your organization is one of the best ways to gain insight into its performance and obtain guidance for providing services in the future. For these reasons, some organizations include client representatives on the planning committee.

Step 1: Getting ready; initiating the planning process *Results in a work plan.*

The nature of stakeholders' participation will depend on any number of factors — size, “culture” and management style, range of constituents and breadth of services. Below are some general descriptions of specific stakeholders' roles in the strategic planning process.

✓ **Funders.** Past, current and potential funders provide another valuable perspective on client needs and how others in the community are either meeting or failing to meet those needs. They may be able to shed some light on the funder community's inclination to fund a specific new program. Likewise, discussions with funders might enable you to design “fundability” into a program at the outset. You should seek funders' input primarily during the environmental assessment stage of the planning process. Current and future funders should also receive an executive summary of the strategic plan.

Step 1: Getting ready; initiating the planning process *Results in a work plan.*

The nature of stakeholders' participation will depend on any number of factors — size, “culture” and management style, range of constituents and breadth of services. Below are some general descriptions of specific stakeholders' roles in the strategic planning process.

✓ **Community Leaders.** Community leaders can also offer valuable opinions about your organization's strengths and weaknesses, as well as insight into the needs of the community and knowledge of the competition. Some organizations include a key community leader on the planning committee, thereby building in community commitment to the organization and its mission.

Step 1: Getting ready; initiating the planning process Results in a work plan.

The nature of stakeholders' participation will depend on any number of factors — size, “culture” and management style, range of constituents and breadth of services. Below are some general descriptions of specific stakeholders' roles in the strategic planning process.

✓ **Competitors and Potential Collaborators.** You might consider asking competitors to contribute to your environmental assessment — not just to get another outside opinion, but to garner information to help the organization be more competitive and develop collaborative relationships

Step 1: Getting ready; initiating the planning process
Results in a work plan.

Organizing a Strategic Planning Committee

