



**Oliver Tessier
& Associates
LLC**

Oliver Tessier
President

20512 Beaver Creek Road
Hagerstown, MD 21740

oliver@olivertessier.com

202.251.3855

www.olivertessier.com

The Elements of Strategic Planning

A User's Map of the Planning Process

These are the basic steps in a full-scale strategic planning process. They are likely to be modified to accommodate the user's needs.

Planning to Plan

- Structure the planning process, determining:
 - Who will participate: While the board has ultimate responsibility for strategic planning, it may choose to involve staff and selected constituents.
 - Who will facilitate: Examine the tradeoffs between paying for outside professionals and using staff, board, or volunteers.
 - What the primary purpose of the process will be: Does the organization need a complete multi-year plan, an update of its existing plan, a review of priorities?
 - Where and when strategic planning will take place: The calendar and location are important. Allow yourself enough preparation time to make the planning exercise effective. Hold planning meetings in a location where people will be encouraged to think freely and will not be interrupted.
- Develop a communications plan for staff, board, and key constituents—including means for their feedback.
- Identify a project leader to oversee the planning effort, someone who will take responsibility for the administrative details of developing and completing the plan.

Clarification of Key Concepts

- Review/develop the organization's mission (its primary purpose).
- Review/develop the organization's vision (what it wants to see over time as a result of its efforts).
- Review/define the organization's values to ensure that they support the mission.

Creating the Plan

- Identify, with participants, the expected outcomes of the planning effort.
- Seek consensus on the organization's vision, mission, and values.
- Identify the key, long-term issues that need to be addressed based on the vision, mission, and environmental scanning.
- Develop and agree upon strategies the organization will undertake to address each issue in service of the mission and vision. Include resource expectations and needs in developing the strategies.
- Consider the strategies as a whole and what changes may be necessary to the organization's design to carry them out and make significant progress toward the achievement of the strategic goals. Address the resources needed to fulfill the strategies.
- Develop evaluation criteria by which progress will be measured.
- Identify next steps for board and staff.



Oliver Tessier
& Associates
LLC

The Elements of Strategic Planning

Page 2 of 2

Implementing the Plan

- ▣ Have management identify the goals and objectives that will support the strategic priorities stated in the plan.
- ▣ Have those who will implement the plan develop a business plan that will support the goals and objectives:

Action Steps

- What will be done, who will do it, and when will they do it?

Evaluation Protocol

- How will you know when interim objectives and the final goals are achieved?
- What are the indicators and how will they be measured?
- How will results be reported and to whom?
- ▣ Ensure that the board takes into consideration both actions and resource issues in approving the annual business plan that supports the strategic plan.
- ▣ Evaluate management, the CEO, and the board annually against the priorities established in the strategic plan.