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The Art of Strategic Planning: Creating a Roadmap for Success
By Suzanne Callahan, CFRE

According to numerous sources, strategic planning has never been more important. Experts such as the Association for Fundraising Professionals and Independent Sector point out the enormous competition for contributed funds. Funders must justify their philanthropic decisions to their own boards. Therefore, the more serious your efforts to plan and the more concise your plan is, the more secure funders will feel about their investment in your organization – and the greater your likelihood of success. Given the resources that we and our funders invest in our organizations – including everything from staff time to office and rehearsal space to artist fees to production costs to computers to season brochures – it makes sense to regularly assess whether we are headed in the right direction.

Most importantly, strategic planning focuses your organization's activities. The process can build consensus among stakeholders, or those who are most interested in, and capable of, helping you succeed. The planning document provides an agreed-upon guide, including goals and strategies, for measuring progress and success. The planning process requires staff and other stakeholders to step away from everyday activities to revisit the mission and set priorities. Planning is growing in importance, given challenges and changes that organizations face in their external environments (such as the artistic landscape, funding, economy and growing competition) and internal environments (such as staffing, leadership transition, or board involvement).

A good planning process is creative yet systematic. It is creative, in that it involves the ideas, insight, and experience from those individuals who are close to – and concerned about – the organization's missions, activities, services, and constituents. Just as important, planning, at its best, involves systematic research. Gathering information thoughtfully and as objectively as possible allows organizations to ask and answer important questions. Sometimes this research confirms beliefs, and sometimes it challenges assumptions. Either way, it positions organizations to make informed decisions about their future directions.

The Basic Components of Strategic Planning
While there is no one formula for effective planning, there are some common steps.

- Identify a planning committee of stakeholders or collaborators who have a vested interest in the success of your program or cause. This would certainly include the board and staff, but may also include other critical voices, such as artists, administrators or production staff, those served by your organization, or community partners.
- Review the issues and circumstances that have led to your decision to plan. Be clear on why you are embarking on a planning process, and what you hope to get out of it. What are the overarching issues to be addressed?
- Decide on a process that suits your vision, budget and organizational culture. Planning can vary in scope and cost. However, a sound process that results in a solid plan is worthy of a healthy investment because it impacts so much of your organization's operations – programs, fundraising, and marketing. The scope includes research, meetings, writing and reviewing the plan, and reporting to others. The budget can include meeting costs, travel, and outside consultants.
- Schedule sufficient time to meet. A planning process can involve between two and ten (or more) meetings, and last from a month to more than a year.
- Research the circumstances that affect your world - both internally and externally. What do you need to know in order to be more effective at what you do? What assumptions are you operating under that may need to be tested? Decide upon some questions that you need to answer. Research often involves looking at issues such as competition for support and impressions on the part of the broader community. Are your programs or services still as vital as they once were? What are the images of your organization in the minds

of your supporters? What are the strongest appeals of your art programs from the perspective of your donors, board, and others? What interest level exists for supporting your mission and furthering your vision?

- Identify ways to collect the information. In light of your research questions, what's the most expedient way to gather the information, given your resources? Methods might include interviews, surveys, group meetings, or a review of written information.
- Develop a written document. At a minimum, the document usually includes the organization's history, major issues, the planning methodology, research findings, analysis, and next steps, as well as a projected timeline and budget.
- Review and approve the document and its related recommendations with stakeholders. The planning process can generate information that reaffirms directions. But just as often it can surprise people by challenging their assumptions. Knowing and processing the range of information helps an organization move forward with greater understanding and awareness.
- Report to supporters on the outcomes of the planning process and secure resources to implement the plan. Be in contact with supporters in advance of, as well as following, your planning process. Most funders endorse planning and will be interested to hear about your results.

Factors to Remember When Planning

- The planning process is just as important as the document produced. The process of identifying and involving stakeholders strengthens relationships and builds understanding. It also garners support for your organization and vision.
- Once you've completed the plan, be prepared for change, which is inevitable. The best-laid plans are subject to change, which can begin to occur the day after the planning process is completed. Maintaining flexibility is the key to continued success.
- Strike a balance between realizing your vision and accepting your reality. Articulating your vision is crucial. But bear in mind that, given the limitations of staffing and other resources, any dramatic changes will need to be phased in over time. One of the major barriers that arise in planning is implementing recommendations that, if not carefully developed, can seem overwhelming and hinder progress.
- Thorough planning is key to effective evaluation. The best evaluations begin with a plan. Agreeing on what success means, and developing a plan for getting there, provides a basis for measuring that success. Refer to The Art of Evaluation, also by Callahan, for more information about the connection between planning and evaluation.
- Bear in mind the context in which you are operating. Just as your vision and art are different from that of other organizations, so are your issues and circumstances. Context affects the way your mission and vision are fulfilled in light of the external environment and internal environment.

Planning to Plan by Denise Cavanaugh, of Cavanaugh, Hagan, and Pierson, www.chpconsult.com.
According to Cavanaugh, an expert in the field, the "Plan to Plan" is the first step in CHP's strategic planning process. It guides the process by identifying the strategic questions facing the organization, developing agreement on the desired outcomes and results, and building support for the strategic planning process from the very beginning of the effort. "Planning to Plan" is a 10-step process, usually accomplished in a facilitated one-day session with stakeholders, by asking these questions:
1. Why undertake a strategic planning process?
2. What are the key strategic issues facing the organization?
3. What are the operational results to be achieved in this process?
4. What should the strategic plan document include?
5. What are the major steps in the process?
6. Who will staff the planning process?
7. Who are the stakeholders in the process?
8. What is the time line for the process?
9. What level of resources will be invested in the process?
10. What are the transition steps to operational planning?