CONDITIONS FOR SUCCESS
STRATEGIC PLANNING

The following conditions should be present prior to an organization initiating a strategic planning effort:

- Commitment, support, and involvement from top leadership, especially the executive director and board president, throughout the entire process.

- Commitment to clarifying roles and expectations for all participants in the planning process, including clarity as to who will have input into the plan and who will be decision makers.

- Willingness to gather information concerning:
  - The organization’s strengths, weaknesses, opportunities, and threats.
  - The effectiveness of current programs.
  - Both current and future needs in the community.
  - Competitors and (potential) collaborators.

- The right mix of individuals willing to participate, including strategic thinkers and actionaries (individuals who are in a position to implement through to completion) as well as big-picture visionaries (conceptual) and detail-oriented (perceptual) thinkers.

- Willingness to be inclusive and encourage broad participation to enable key people to feel ownership of and are energized by the process.

- An adequate commitment of organizational resources to complete the planning process as designed, e.g. staff time, board time, dollars available for market research, consultants, etc.

- A board and staff who understand the purpose of planning, recognize what it is and is not able to accomplish, and have clarity about the desired outcomes of the process and issues to be addressed.

- A willingness to:
  - Question the status quo and look at new ways of doing things.
  - Ask the hard questions and face difficult choices.
  - Make decisions that are best for the organization’s current and future constituencies as well as support organizational change as a result of the planning effort.
CONCLUSIONS FOR SUCCESS

- The absence of a critical operational issue or crisis situation that would interfere with the strategic planning process. In particular, an organization must have the financial capacity to sustain itself for the immediate future without a financial crisis that would detract from the planning effort.

- Top management’s commitment to carefully consider recommendations made during the planning process and not ignore, for intuitive reasons, those conclusions, decisions and recommendations originating from the planning effort.

- The absence of any serious conflict between players within the organization, although a healthy dose of respectful disagreement and questioning is welcome.

- The absence of any high-impact decisions being made in the next 6 months or so by external sources.

- No merger or other major strategic partnership effort is underway.

- A board and top management who are willing to articulate constraints and non-negotiable issues upfront prior to the planning process.

- A commitment to tie the strategic planning process to the organization’s annual planning and budgeting process that results in a detailed annual operating plan for the upcoming year.

- A commitment and capacity to allocate sufficient resources to support the implementation of core strategies.

Source: Strategic Planning for Nonprofit Organizations by Michael Allison and Jude Kay.