

STRATEGIC PLANNING

The firm's increasing involvement in this kind of engagement follows a trend: strategic planning has the potential to change the trajectory of an organization's future.

Unlike TAG's other services, strategic planning in one philanthropic sector will resemble strategic planning in another. As a result, this chapter will present TAG's preferred planning process across all sectors. All TAG associates involved in a strategic planning engagement should also read BoardSource's white paper, "[Strategic Planning: Understanding the Process](#)," both for the steps involved and its advice for dealing with the challenges that may arise.

The strategic planning process begins with a proposal and a memorandum of agreement. After that, work starts with the creation of a [MAP for a strategic plan](#), a Monthly Action Plan. For this kind of work, expect the engagement to last no less than three months and perhaps four. In complex situations it may even last longer. No matter how long, though, *quality* and *thoroughness* should be the watchwords for creating a document crucial to the organization's future. The engagement will most resemble TAG's work on a development assessment. Whether the work focuses only on fundraising operations or an entire organization, the goal is to create a roadmap for the organization to help guide meaningful decisions for the next three to five years.

1. Conduct the launch call with the client. The [Agenda](#) is particularly important and must accomplish several key tasks to start the engagement well and keep it on track.
2. Identify a short list of names for the strategic planning committee. Share the [Roles and Responsibilities](#) of the committee with the client's leadership. Membership of the committee should include major stakeholders and closely allied volunteers and staff and number up to seven people.
3. Reach out to candidates and invite them to join the committee; share the committee's roles and responsibilities with each invitee and formalize the committee's membership.
4. Set at least three committee meeting dates, including one a little more than halfway through the engagement and a final one before the report is presented to the full governing board.
5. Submit the data and materials request to the client. Use the [Data Request Form](#) and coordinate project needs with the director, data analytics. Gather annual reports, newsletters and other publications, organization tables for all verticals, acknowledgement letters; annual fund letters; two most recent annual reports to the public, if available; two-year audited financial statement; templates for gift and pledge agreements; gift acceptance, gift recording, and gift recognition policies; position descriptions and staff resumes; standard brochures, if any; templates for c.g.a. agreements, if used; two most recent IRS Form 990s, and much more.
6. The director of data analytics should follow up to clarify questions about the request and the nature of the data provided. The data request will resemble that for a full development assessment.
7. Analyze the data and conduct benchmarking.
8. Identify the list of interviewees, including members of the strategic planning committee.

9. Finalize the [letter of invitation](#) and the [strategic plan conversation accelerant](#) for interviewees and gain approval of the conversation accelerant for use during the interviews.
10. Have the client send the invitations and schedule the interviews.
11. Conduct interviews with 10 to 15 people, primary stakeholders all and save all notes to the client's folder in Dropbox.
12. Identify other people to be involved in two to three focus groups of seven to nine members each. Also identify the list of still other names to receive the electronic survey.
13. Conduct two to three focus groups.
14. Develop the electronic survey and gain the client's approval for it. Then send the survey with a deadline for return. It may be necessary for the client to send the survey a second time to those who have failed to respond initially.
15. Conduct the internal TAG review of the data from the request, the interviews, the focus groups, and the electronic survey. Again, record all findings in the client's folder in Dropbox.
16. Validate and review the client-based data with the client.
17. Share the findings with the strategic planning committee and the client's leadership and together with the committee develop the planning report's themes and SMART goals.
18. Draft the preliminary strategic plan. Be certain to leave sufficient time for drafting what will be a complex presentation fully designed and laid out. [See a sample report here](#). The report should include such sections as
 - a. Introduction, including Methodology and Acknowledgements
 - b. Executive Summary
 - c. Programs and Services Offered
 - d. Marketplace Assessment (Data Analytics/Benchmarking)
 - e. Competitive Advantage/Positioning Statement
 - f. Needs Definition
 - g. S.M.A.R.T. Goals (Specific, Measurable, Attainable, Realistic and Timely)
 - h. Marketing and Communications Strategy
 - i. Implementation Timetable and Best Practices
 - j. Benchmarks and Evaluation
19. Share the draft with the strategic planning committee and gain member feedback. Revise accordingly.
20. Obtain art, photos, and graphic guidelines from the client and submit the report to a designer for layout and design.
21. Develop the calendar of progress for the engagement and propose a schedule of implementation to the committee. Revise as needed.
22. Present the final, full strategic plan to the strategic planning committee. Revise as needed.
23. Present the final, full strategic plan to the governing board, including the timetable for implementing the plan.
24. Complete the engagement with a thank-you letter(s) to the client's leadership.

