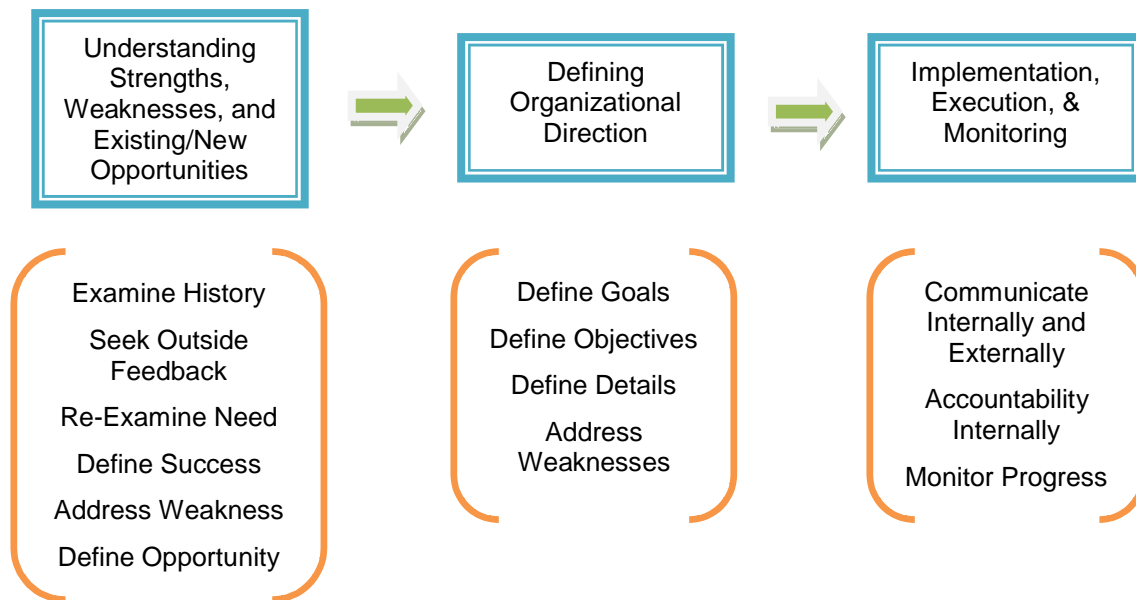


Collaborate to Assess, Plan and Implement

Manageable, Affordable Process Delivers a Concise and Logical Roadmap

Achieve believes strategic planning should be a collaborative process that results in a plan tailored to each client's needs. To reach this result, we engage the client organization throughout the assessment, development and implementation phases. Staff, leadership and board members help us gather the internal and external stakeholder input critical to an honest assessment of strengths and weaknesses. At the completion of this process, Achieve will deliver a plan that is simple in design and easy to articulate, implement and monitor.

Strategic Planning Overview



Strategic Planning Process Step by Step

Understanding Real Strengths, Weaknesses, and Growing Opportunities

- 1) Review client's previous strategic plan, case statements, annual reports, supporting documents and informational materials to outline organization's successes, challenges and potential areas for improvement.



- 2) Establish a planning team of up to six people to oversee the strategic planning process. This planning team includes staff, board and key constituents.
- 3) Meet with the planning team to review the process and timetable and discuss questions for the survey instrument. Review initial findings of potential areas of weakness and challenges based on initial assessment.
- 4) Conduct a survey (online or in person) of external stakeholders to gather their input and opinions about the future direction of the organization. Those to be surveyed include:
 - Funders (corporations or foundations)
 - Clients/program participants (individuals or groups receiving the organization's services)
 - Donors (all levels of donors, annual fund and major gift)
 - Staff (program and administrative)
 - Board
- 5) Conduct a full board retreat (6 hours) with the following "agenda":
 - Review mission and vision to set context
 - Discuss the reason for a strategic plan
 - Divide board into groups to answer the following questions:
 - "What is success?"
 - "Has anything changed in the need we address?"
 - "What weaknesses and challenges exist?"
 - "What opportunities have not been sought or fully realized?"
 - "If money were no object, where would we be in X years?"
 - "What should be and can be accomplished in X years?"
 - Review answers
 - Compare group visioning with survey feedback
 - Determine overarching strategic initiatives/goals based on discussion for inclusion in strategic plan

Defining Organizational Direction

- 1) Meet with the planning team (post retreat) to refine the initiatives/goals.
- 2) Conduct a half-day board retreat (3 hours) to react to the initiatives/goals and:



- Create objectives for each goal
- Create timeline for implementation
- Determine responsibility
- Assign planning team members who will draft the strategic plan – set deadline for draft

3) Achieve will review and edit plan.

Implementation, Execution, and Monitoring

- 1) Draft plan to be presented to planning team for approval and presentation to the board for adoption.
- 2) Achieve will assist in the creation of a plan-monitoring task force.
- 3) Achieve will attend first meeting of task force.
- 4) Follow-up with Achieve in 6, 12 or 18 months (Optional)

Learn more about Achieve

For information about how Achieve can help increase your impact, visit Achieve's Web site (www.achieveguidance.com) or call 317-637-3000.