

Are you ready to plan?

Purpose of a strategic planning process

1. Keep the organization relevant, sustainable, and responsive.
2. Make the organization stronger five years from today.
3. Help build/sustain relationships between the organization and the community, donors, and key stakeholders.

Evaluating your current plan (if you have one)

- Is it a compelling vision for your stakeholders and members?
- Does the plan increase name recognition and public understanding of your organization?
- Do you have agreement on the tangible outcomes that you will pursue and specific timeframes?
- Are your objectives balanced to include:
 - External objectives (to save specific rivers or change policies)
 - Internal objectives (to grow your capacity and organization)
 - Community outreach objectives (i.e. improving media relationships)
- Have you developed action plans to help you reach those outcomes?
- Does your plan give clear evaluation points? Have you evaluated the plan on a regular basis?

Assessing Your Organization's Readiness

- Building a strategic plan requires time and resources.
 - Strategic plans can take up to 7-8 months: the Board and staff must be prepared to dedicate the time to meet, discuss the issues, and reflect on questions as they arise.
- Successful strategic planning requires trust and communication.
 - Not everyone can participate in the entire planning process: trust and transparent communication between those on the planning committee and the rest of the team are important to build plan buy-in and raise issues early in the process.
 - The Executive Director or other designated leadership individuals will be responsible for the heavy-lifting during the strategic planning process and may require additional support from their staff and Board

River Network Strategic Planning Process Outline

Step 1. Gather your Planning Committee.

Typically made up of 2-3 Board members who are committed to leading the organization in the development of its Strategic Plan, and to ensuring the organization implements the Plan once it's completed. Other members of the planning committee often include the organization's Executive Director or designated leadership member, another lead staff person, and 1 or 2 high-level volunteers or previous Board members. The makeup of the Planning Committee will be different for every organization, based on who leadership identifies as the most effective stakeholders in the strategic planning process.

Step 2. Prepare for a Situational Analysis.

Analyze the organization's current situation, identify who could provide the best information through a survey and/or interview, and review and agree upon the questions that will help the organization design a path forward. The situational analysis may include:

- o Interviewing or surveying a select list of key stakeholders
- o Interviewing or surveying the organization's Board of Directors and staff
- o Conducting a membership survey
- o Reviewing the organization's financial health

Step 3. Identify and Discuss Strategic Issues and Priorities

River Network staff will sift through the survey and interview results, identify themes and outstanding questions, and outline next steps to be addressed at a Strategic Planning retreat. We will present our "key findings" to the planning committee and together, build a retreat agenda.

Step 4. Plan & Host a Retreat

It is River Network's belief that both Staff and Board benefit from attending and participating in a strategic planning retreat. A retreat could be a half-day, full-day, or more, depending on the needs and preferences of your organization. Some organizations opt to schedule the retreat to align with an existing board meeting so as to accommodate member's schedules. Along with the organization's Executive Director/designated leadership, River Network staff will create a retreat agenda, facilitate the discussion amongst the Board and Staff, and write up a post-retreat strategic outline.

Planning Step 5. PUT IT IN WRITING! Following up on the work done at the retreat, a "drafting committee" will be convened to create a working document. The drafting committee could include communications and/or philanthropy staff, to help with messaging and ensure the plan aligns with donor communications as well. Other members of the committee should include the organization's leadership and 1-2 Board members. The

strategic plan will include specific goals, strategies, and actions with corresponding timelines and information on who is responsible for seeing them achieved. The strategic plan might be accompanied by annual action plans or contain a workplan within it; all of these documents will be drafted and submitted to the board for approval.

Planning Step 6. Implement, Evaluate and Reassess. The Board should refer to the plan quarterly, and evaluate it annually. Reporting on how the plan is being implemented should help manage board meetings and keep the group on track. Should either internal and/or external conditions change, the Board may need to update or reassess the timeline of certain goals, strategies, and actions. The Board needs to annually do four things:

- 1) Evaluate progress towards current objectives
- 2) Consider new strategic directions
- 3) Set new program priorities
- 4) Adopt an annual budget and work plan