

Roles and Responsibilities in Strategic Planning

Step	Typical Board and Staff Roles and Responsibilities	Consultant Contribution
1. Prepare to plan	Full board makes commitment, establishes planning committee to develop approach and timeline	<ul style="list-style-type: none"> • Experience in charting out planning processes • Guidance regarding typical timelines and best practices • Board education regarding the value of planning
2. Review/revise/validate Mission, Vision and Values	Board, usually with input from staff and/or membership (Board should approve final vision and mission statements)	<ul style="list-style-type: none"> • Expert facilitation of process • Education regarding the definitions of vision, mission and values • Guidance regarding how to craft effective statements
3. Gather relevant data and stakeholder input	Board and Staff	<ul style="list-style-type: none"> • Expertise regarding methods for gathering input • Assistance in designing data collection tools, conducting outreach, gathering feedback • Independent third party to listen to stakeholders and synthesize comments • Research on peer organizations or trends
4. Set goals/develop plan framework	Board and Executive Staff	<ul style="list-style-type: none"> • Expert facilitation • Retreat design to ensure time is used efficiently • Assistance in reaching consensus regarding strategic priorities • Template for planning and education regarding terminology
5. Write the strategic plan	Staff and/or relevant board committees. At this point, the development of more refined objectives and action steps is typically delegated to those who will be doing the work.	<ul style="list-style-type: none"> • Template • Education regarding how to write measurable objectives • Coaching • Outside accountability to keep the process moving
6. Review draft plan	Board has primary responsibility to see that the plan hangs together, is realistic and reflects board priorities.	<ul style="list-style-type: none"> • Facilitation and guidance • Reality check: an outside reviewer who can comment on use of jargon or areas where the plan is unclear • Ask some of the same questions your funders will ask you—identify plan weaknesses in time to correct
7. Approval of final strategic plan	Board	