

Roles & 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	