



# Strategic Planning Options: What and when

I know many organizations see “planning” as a deterrent to the “real work” of achieving their environmental aims. Yet planning for the future is the only way we can hope that we’ll reach our intended destination and not somewhere else.

A strategic plan provides the organizational “goose sense” so the right people, resources and funding all pulling in the same direction. It helps you answer the questions: why your organization exists, who it serves and how its programs and services meet the needs of those it serves.

Getting started involves knowing *what aspects to plan for* as well as *when strategic planning is most relevant*. Keep reading for guidance on both.

## What aspects to plan for?

Below are ways that organizations can “chunk” what they need to address in their plan.

1. **Internal and external context.** The situation you find yourself in – both the external climate and your internal operations.
2. **Mission and vision only.** (Why do you exist (mission) and what do you aspire to (vision)). Most organizations need support with these foundational pieces.
3. **Strategies, only.** Once you have a well-considered and well-supported mission and vision, here you can look to figure out the general approaches to achieve them.

4. **Vision, mission, strategies.** Combination of #s 2 and 3 without getting into the nitty gritty of action and project planning.
5. **Vision, mission, strategies, action steps.** Same as #4, plus details of “who does what, by when” for each strategy – all essential for keeping the momentum going.
6. **Review of progress.** “Where have you been and what have you accomplished” are questions the most effective organizations answer regularly.

## When to use strategic planning support

Strategic planning is helpful:

- **At the start or end of your planning cycle:** Typically, 3-5 year planning horizons, when a new, full blown plan is usually appropriate.
- **After a major societal or organizational change or upheaval:** Small or large adjustments to your existing plan are nearly always needed after a major change.
- **During quarterly or six-month “tune ups:”** The most successful organizations habitually check in with their progress and adapt accordingly.
- **Yearly:** A good time for an overall update and evaluation.

For more info: [charlotte@envision-synergy.net](mailto:charlotte@envision-synergy.net) or 416-778-4713. We’d be pleased to help!