

Functional Strategic Planning Process

1 Planning and Stakeholder Identification

1. An initial meeting with clear and agreed upon deliverables.
2. A pre-strategic planning meeting to:
 - a. Determine the stakeholder audiences to be surveyed
 - b. Create relevant stakeholder questions
 - c. Decide best practice for stakeholder information gathering (digital, telephone or focus groups)
 - d. Decide which stakeholders will attend the strategic planning session

Outcome

Identifying relevant stakeholder groups and the specific information that we want to learn.

2 Research and Analysis

1. Frank Growth Solutions Inc. will create the survey and provide a survey link for distribution to the stakeholder audiences that were identified in the earlier session. These stakeholders may include:
 - a. Board, staff and volunteers
 - b. Community members (beneficiaries of program services)
 - c. Other
2. Completed surveys are returned confidentially to Frank Growth Solutions Inc. for analysis.

Outcome

Analyzed information will help us to better understand the needs of the people that we serve and work with.

3 Strategic Planning Session(s) & Follow-up Work

1. Facilitation of strategic planning sessions and follow-up work to complete five distinct strategic planning steps:
 - a. Review of research findings
 - b. Looking back historically
 - c. Envisioning the future
 - d. Brainstorming (SWOT Analysis)
 - e. Creating planning themes/'dotmocracy' to prioritize strategies
2. Preparation and prioritization of the goals and objectives that support (are derived from) the five strategic planning steps.

Outcome

A consensual, democratic and collaborative strategic plan has been developed.

4 Wrap Up and Implementation Support

1. A laminated chart of the goals and objectives will be supplied. This chart will act as a visual guide for implementing the strategic plan.
2. Attendance at a board meeting to introduce the plan and facilitate intentional inclusion of the strategic plan.
3. An informal check in at the six-month mark.
4. It is suggested that an annual strategic plan review be undertaken.

Outcome

Effective implementation of your functional strategic plan.