

Thinking About Various Planning Approaches

Planning Approach	Best Applications	Advantages	Disadvantages
Half-day, Full-day, or Weekend “Retreat”	<ul style="list-style-type: none"> - Renewing vision and values - Board training or team-building - Focusing on one or two key issues - Agreeing on near-term priorities 	<ul style="list-style-type: none"> - Low time commitment of staff and volunteers - Less expensive - Quick completion 	<ul style="list-style-type: none"> - Easy to shortcut research and external perspectives - Often creates frustration by trying to tackle too much in a few hours of discussion
Planning Committee (Usually a sub-committee of board and staff members)	<ul style="list-style-type: none"> - Short-term (12-24 mo) business planning - Mid-range (3 yr) strategic planning - On an on-going basis, a Board Strategic Planning committee might also play the role of keeping the board informed of trends and opportunities 	<ul style="list-style-type: none"> - Time mainly required from a subgroup of the board or board/staff - Small group can often plan and write quickly - Group can keep board informed of progress - Longer process allows more research and consideration of options and alternatives 	<ul style="list-style-type: none"> - Other board members may feel out of the loop - Other board members may not feel buy-in to new plans - Can miss opportunity to benefit from knowledge and perspectives of all board members - Excludes board members from participating in one of the most interesting board roles
Team Planning	<ul style="list-style-type: none"> - Mid-range to long-range planning (2-4+ yrs) - Newer organization trying to really get their first visions and plans in mind 	<ul style="list-style-type: none"> - Everyone can be/feel a part of the process - Easy/safe to involve other volunteers (future board members?) - Allows focus in more areas of the organization - Longer process allows more research and consideration 	<ul style="list-style-type: none"> - Requires a lot of people to make a commitment of time - Requires a lot of coordination - Scheduling can lead to an extended timeframe - Can lose momentum - Most expensive

Some Key Planning Questions and Considerations:

- Do we need a full organization plan or to resolve/clarify one or two key issues?
- Do we want to focus Internally, Externally – or both?
- What is our desire or need to gather information from various stakeholders or communities?
- What is our likely time horizon?
 - Near-term -12-24 months
 - Typical - 3 years
 - Long-range 5-10 years(few nonprofits beyond colleges and universities plan here)
- What Volunteer Skills and Time are Available?
- What Staff Skills and Time are Available?
- What Financial Resources are Available?
- Life Stage of Organization – Idea, Startup, Adolescence, Growth, Mature, Decline, Turnaround, Dissolution?
- Are there Special Circumstances such as leadership transition, financial instability, legal or public crisis?
- Finally, what do we expect of the outcome – what is success?