

Roles in Strategic Planning

Planning the future of an organization is a major endeavor and involves a great number of people. It cannot happen in a vacuum. The success of the final plan — and the actual planning process — depends on the engagement of the right people at the appropriate phases of the process.

Strategic Planning as a Group Effort

Why are so many people needed during the strategic planning process? Planning requires thinkers and doers. A multitude of skill sets and expertise is needed during each stage. The strategic plan as an end product must meet the needs of a wide variety of stakeholders. If they are left out of the process, the final plan tends to serve the needs of a few who may not be fully aware of the actual impact of their decisions. It is unlikely to be successful for the decision-makers to serve the plan on a platter and expect to get the necessary buy-in and an enthusiastic reception. When those responsible for the health of the organization, those responsible for doing the daily work, and those who depend on the products and services are engaged to develop, or at least provide feedback on the final plan, it is more readily accepted and owned by all participants.

Role of the Board

Without the full board's blessing and participation, the success of the planning effort and the plan's eventual acceptance and execution is compromised. Whether the board or the chief executive introduces the need for planning, the board must be behind the decision to move forward, participate in the process and ultimately approve the final directives. The board's role is to set direction and, with the chief executive, determine and fine-tune the mission, vision, and the values of the organization. The board is the true liable body of the organization — setting the strategic direction is part of their role and cannot happen without their input and engagement.

The board works in close partnership with the chief executive but it must own the final strategic plan. Each board member should contribute to the strategy development and understanding of the consequences of board decisions. A board committee may steward the plan and other committees may work on different portions of the plan.

Planning is only one way boards are involved in strategic planning and direction setting. Strategic thinking is a key attribute of an exceptional board and should be evident in every board meeting. Issues of substantial consequence dominate the agenda. The board reflects on ideas, makes sense of circumstances, discusses and votes on decisions on behalf of the organization. Strategic and generative thinking keeps the board one step ahead in identifying priorities.

Role of the Chief Executive

The chief executive manages the strategic planning process and is often evaluated on the plan's execution. Chief executives are visionaries, framing the options available for the future. They usually are the instigator of the planning idea and ensure that the plan is executed in a

deliberative manner. The chief executive coordinates the participation of everyone whose collaboration is needed. They may delegate some of the individual tasks, but they remain the supervisor who ensures that planning proceeds as expected.

Role of the Staff

Without the staff's input, perspective, and support during planning, and final implementation of the plan, it would be impossible to carry out the strategic planning process. Staff provide relevant context for planning as they are closer to the needs of the organization and have the means to make things happen. Staff members organize the meetings and retreats that bring all the players together. After the overall plan is defined, the staff should draft its own operational plans for implementation. The operational plans are the natural next step to the strategic plan. They translate the board-approved guidelines into workable directives and schedules.

Role of a Consultant

A consultant or a professional facilitator can add objectivity and autonomy to the process. Small-scale planning does not automatically necessitate the use of a consultant, but if the organization is going through a major shift via planning, a facilitator can ensure that all the steps receive proper attention. A consultant may act as a mere facilitator who directs the process and runs the meetings but does not impose their opinions in any way. A consultant may also act as the professional guide who takes the responsibility of defining the key issues through interviews and other methods, and then helps steer the board and staff in the right direction.

Role of Various Constituents

Rich information leads to wiser decisions. Interviews, surveys or focus groups can include stakeholders when external environmental scans are studied or when user feedback is needed on the quality of services. Bringing representatives to planning meetings, however, is not usually necessary. Planning is an internal exercise and deserves due confidentiality.

201 Resource | Last updated: April 14, 2023

Resource: [Driving Strategic Planning: A Nonprofit Executive's Guide](#)