

GUIDE: WHO NEEDS A SEAT ON YOUR PLANNING TEAM?

The most effective nonprofit strategic planning process involves a planning team that consists of people who can add value to the planning process.

These planning team individuals should be chosen for their knowledge and skills, not just for their position in the hierarchy. A mix of constituents, Board members, senior staff, suppliers and some key stakeholders who are not as familiar with the operations of the organization but who have a point of view that truly matters to the organization.

It is a mistake to use only the staff, or only the Board, of the non-

profit organization in the planning process. Those people whose points of view truly matter to the organization's future should be included. Senior staff, constituent representatives, supporters of the organization, perhaps even some 'competitors' should be considered for the planning team.

There is no ideal number of participants for the planning team, but it should encompass individuals who represent different skill levels in knowledge, expertise and thinking styles, and more importantly, in group dynamics.

The group could be anything from five

people up to seventy, although a team of between fifteen to twenty people works very well.

1. THE NONPROFIT BOARD OF DIRECTORS

ROLE: MONITORING

The Board ultimately approves the Strategic Plan, but does not necessarily formulate the Strategic Plan. Board members may participate in the planning process, but they do so as individuals, not as a formally constituted meeting of the Board. The Board then monitors the achievement of the Strategic Plan, and undertakes corrective action where required.



2. THE CEO

ROLE: IMPLEMENTING AND CONTROLLING

The CEO sets the climate and tone of the strategic planning process, establishes the planning group, and ensures the Action Plans are completed on time and have appropriate control and measurement systems in place.

3. SENIOR STAFF

ROLE: IMPLEMENTING

Senior staff duplicate the nonprofit CEO's role within their respective departments, maintain communications between the Board/CEO and other staff, provide functional guidance to other staff, and report on progress of the Action Plans.

4. STAKEHOLDERS

ROLE: EXPERT ADVICE

Stakeholders could represent a current or potential consumer base, key suppliers and indirect competitors.

5. COMMITTEES

ROLE: SUPPORT

Committees can be formed to support the achievement of the various Action Plans of the organization. These committees would be formed to support staff in their implementing role. If the nonprofit organization is too small to have staff who can implement, committees can often be used in this capacity to assist the CEO in implementation.