## Roles & Responsibilities in Strategic Planning

<table>
<thead>
<tr>
<th>Step</th>
<th>Typical Board and Staff Roles and Responsibilities</th>
<th>Consultant Contribution</th>
</tr>
</thead>
</table>
| 1. Prepare to plan | Full board makes commitment, establishes planning committee to develop approach and timeline | • Experience in charting out planning processes  
• Guidance regarding typical timelines and best practices  
• Board education regarding the value of planning |
| 2. Review/revise/validate Mission, Vision and Values | Board, usually with input from staff and/or membership (Board should approve final vision and mission statements) | • Expert facilitation of process  
• Education regarding the definitions of vision, mission and values  
• Guidance regarding how to craft effective statements |
| 3. Gather relevant data and stakeholder input | Board and Staff | • Expertise regarding methods for gathering input  
• Assistance in designing data collection tools, conducting outreach, gathering feedback  
• Independent third party to listen to stakeholders and synthesize comments  
• Research on peer organizations or trends |
| 4. Set goals/develop plan framework | Board and Executive Staff | • Expert facilitation  
• Retreat design to ensure time is used efficiently  
• Assistance in reaching consensus regarding strategic priorities  
• Template for planning and education regarding terminology |
| 5. Write the strategic plan | Staff and/or relevant board committees. At this point, the development of more refined objectives and action steps is typically delegated to those who will be doing the work. | • Template  
• Education regarding how to write measurable objectives  
• Coaching  
• Outside accountability to keep the process moving |
| 6. Review draft plan | Board has primary responsibility to see that the plan hangs together, is realistic and reflects board priorities. | • Facilitation and guidance  
• Reality check: an outside reviewer who can comment on use of jargon or areas where the plan is unclear  
• Ask some of the same questions your funders will ask you—identify plan weaknesses in time to correct |
| 7. Approval of final strategic plan | Board | |