

National Christ Child Society

Strategic Planning Checklist for Chapters

- **Assemble a Board-approved team with a single leader**
 - Include leadership and broader membership
 - Include people with capabilities relevant to aspects of planning
 - Don't use committee chairs for programs/activities on committee to evaluate the programs/activities they lead
 - Do seek program/activity evaluations from committee chairs during the research phase as key inputs to broader evaluations
 - Bring in a facilitator if possible (whether experienced facilitator/consultant or business professional who is a friend of Christ Child)
- **Identify a timeline and work plan for phases of process and gain Board approval**
 - Allow adequate time for varying phases, especially research phase, course of action development and selection, plan drafting, and gaining alignment from leadership, key personnel and partners
 - Expect the process to take up to 9 months to complete –remember it is worth the effort – you will get out of it, what you put into it
 - Ensure timing aligns with chapter's ordinary planning rhythm and leadership turnover
- **Engage in Strategic Planning Process**
 - **Focus:**
 - Assemble existing mission statement/core values as starting point—and ensure core team and leadership believe these are the right ones going forward
 - Articulate what your current state is and what value you are offering, including:
 - What activities you are currently doing (programs, events, fundraising) and how you are doing them?
 - What and how many children you are serving?
 - What organizations and people you are partnering with?

- What is your chapter's brand equity, meaning how, and how well, is your chapter known in the community?
 - Is your chapter's leadership well aligned with broader membership?
- Do research, using surveys and interviews as appropriate, regarding:
 - How have the needs of children changed/how are socio-economic conditions changing for children in your community?
 - What do these changes/trends mean for your existing programs and/or possible other programs or activities you might create?
 - How does your chapter do what it does better (or worse) than others in your community?
 - Does what others are doing have the potential to displace what you are doing or make it less relevant or impactful?
 - How do you and your respective partners evaluate your partnerships in terms of relationship, collaboration and results?
 - How does your membership view its activities, programs and leadership?
 - What are the roadblocks to success for your existing activities and programs (including volunteers, leadership and resources)?
 - How good is your chapter at developing new programs/activities?
 - What is your chapter's culture around/appetite for change?
- Create a vision for a future state and related goals and objectives
 - Pull together and evaluate the research and identify areas for greater impact as well as areas where you might consider stopping or reducing an activity because of low impact or relevance
 - Use a SWOT analysis format to summarize research findings:

	Favorable	Unfavorable
Internal Factors	Strengths	Weaknesses
External Factors	Opportunities	Threats

- Engage in a facilitated discussion about a vision for the future—key desired outcomes--and test results with leadership/Board
- Translate vision into core, reasonable goals and objectives and share with leadership/Board
- **Plan:**
 - Assign people to teams to develop courses of action for each objective
 - Evaluate the courses of action as a team, selecting the most realistic and best (and flag risks to success, including member/leadership capabilities, resources and partner/other vested organization’s competing interests)
 - Articulate strategies in a single draft plan, including human and other resources, timelines and accountabilities of members and partners
 - Organize plan with summary of mission, vision, situation analysis first, followed by core elements of plan in order of priority and describe how progress will be monitored
 - Write for broader audience to develop support and alignment
 - Think about developing excitement and confidence about the plan
 - Be as short and simple as possible
 - Where impactful and supportive, quote key stakeholders/third parties

- **Align:**
 - Review your draft plan carefully with leadership/Board, and make adjustments as needed
 - Align with partners around what each partner is accountable for, how you will measure it and how and when you will monitor progress
 - Communicate plan to chapter, partners and other stakeholders

- **Monitor:**
 - Review progress according to pre-set schedule
 - Communicate about and reward progress
 - Make adjustments, as needed, to address risks and/or accountabilities
 - Celebrate success against measurable objectives
 - Periodically report back status in formal way
 - Define next the strategic planning timeframe