

Foraker's Approach to Strategic Planning: What You Can Expect

We believe that thoughtful strategic planning is the foundation for moving an organization's mission forward to success. Planning should involve the board and the leadership staff member (if applicable) at a minimum. Other key stakeholders can and should be involved as determined in advance of the session. Foraker's planning process is deeply rooted in our Nonprofit Sustainability Model. The model is inspired by the work of James Collins and Jim Porras, who have conducted years of research into what makes companies thrive in the marketplace. We, like Collins and Porras, view the strategic plan as a high-level compass setting the direction for an organization's journey of sustainability – not a detailed map showing every landmark along the way.

A strategic plan will be clear about “who you are and where you are going.” A facilitated strategic planning session by Foraker is divided into four basic steps:

1. **Defining your core purpose.** This differs from your mission by defining in very concise terms “what business you are in.”
2. **Defining your core values.** Every organization has a culture and that culture is held together by a set of core values that capture the energy and motivation of the mission.
3. **Defining the long-term strategic direction(s).** Organizations that know “who they are” can better articulate where they are going. We help groups look far into the future, 7-10 and sometimes 20-50 years, to an achievable and meaningful outcome.
4. **Defining short-term strategic direction(s).** Different than business as usual, effective and motivating strategic plans focus on a handful of short-term (3-5 years) goals. This plan can also include objectives about how to achieve the goals.

Our time together is interactive, challenging, and fun. We strive to create a dynamic atmosphere that results in a common understanding of where your organization is today and where you want it to be in the future. Additional steps are often added to gain information from key stakeholders before asking the team to make decisions. Every engagement is unique. Let us help you design a process that is right-sized for your organization.

Time Estimates

Pre-Meeting & Preparation: At a minimum, our strategic plan process begins with a pre-meeting. This is typically a 30-minute conversation where our facilitator meets with the executive director (if applicable) and the board chair to learn more about the organization's needs and discuss the session's logistics. Sometimes, there are several meetings before the day of the session. It is also common for organizational leadership to ask for preparation sessions or survey stakeholders before a planning session. **Estimate: 1-3 hours, with survey 8-10 hours**

Facilitated Strategic Planning Session: We ask that organizations set aside a minimum of 6-8 hours for the planning session to accomplish the four steps outlined above (possibly more if your organization is new, is very large or complex, or is in a place of transition or turmoil). The session can be divided into two sessions or be accomplished in one day. **Estimate: 6-8 hours**

Written Plan: The Foraker team will email a draft written plan back to the organization and articulate next steps. The organization board will still have varying levels of work to do to complete the process to get to a final approved plan. This work can often be done without Foraker support, but we are always willing to support the process upon request. **Estimate: 3-4 hours and more if requested for additional steps.**

Six-Month Follow-up: Strategic and annual plans are only useful if the organization's leadership agrees to use them as living documents. This means using them to guide meetings and decisions and utilizing them to build other key plans including budgets, staffing and board succession, fund development, communication and technology plans. The Foraker team will schedule time with you to see how we can support the plan's implementation. **Estimate: 1 hour**

While there is no "one size fits all" description of time required, it is safe to allocate a **minimum of 15 hours** for the strategic planning process. Plans that include additional facilitation/training, complex plans, and plans that require more support on the front and back end of a planning session will take additional time. You may also wish to have a facilitated annual planning session after the completion of the strategic plan.

Facilitated Annual Planning (optional add-on): Foraker strongly recommends that the organization take the next step and articulate 12-18-month priorities in a separate annual plan. This step occurs after the completion of the strategic plan. **Estimate: 4 hours at a minimum**

Cost Estimates

Foraker charges an hourly rate for our services. These rates do not include travel expenses such as airfare, mileage, lodging and meals. We do not bill for our travel time however, if travel outside Alaska is required a daily rate (8 hours) is charged. We have a tiered rate system. The hourly rate will be determined by the following:

1. The facilitator – Senior consultants and our President/CEO charge at a slightly higher rate.
2. Partnership – if your organization is a Foraker Partner, there is a discount
3. Operating budget – if your organization has a budget of over \$10 million, there is a higher rate

You can find our current hourly rates on our website [here](#).