



Built-in, Not Tacked on: Strategic Planning for Legacy

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Facilitator:

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Agenda

Introductions, inspirations, & confessions (15)

What defines strategic planning? (15)

Strategic Plan v. Legacy Plan (10)

Breakouts/exercise (15)

Reports out, reflection (15)

Don't let it sit on a shelf... (5)

What defines a strategic plan?



- Capacity and effectiveness
- Programs, administration, and finance
(but not exhaustive)
- Big picture
- Practical elements of the organization
- *Linear progression that binds the big picture to implementation*
- In each section, from general to specific...



	Mission	Objectives	Tasks	Benchmarks	Deadlines	Person resp.
1. Programs						
2. Admin.						
3. Finances						

Camp Ramah in the Berkshire's 7 Strategic Goals



Strategic Plan Outline for Goals/Critical Issues

S.M.A.R.T. Action Items:

S = Specific

M = Measurable

A = Attainable

R = Relevant


T = Time-bound

Strategic Goal Area

Goal Statement:

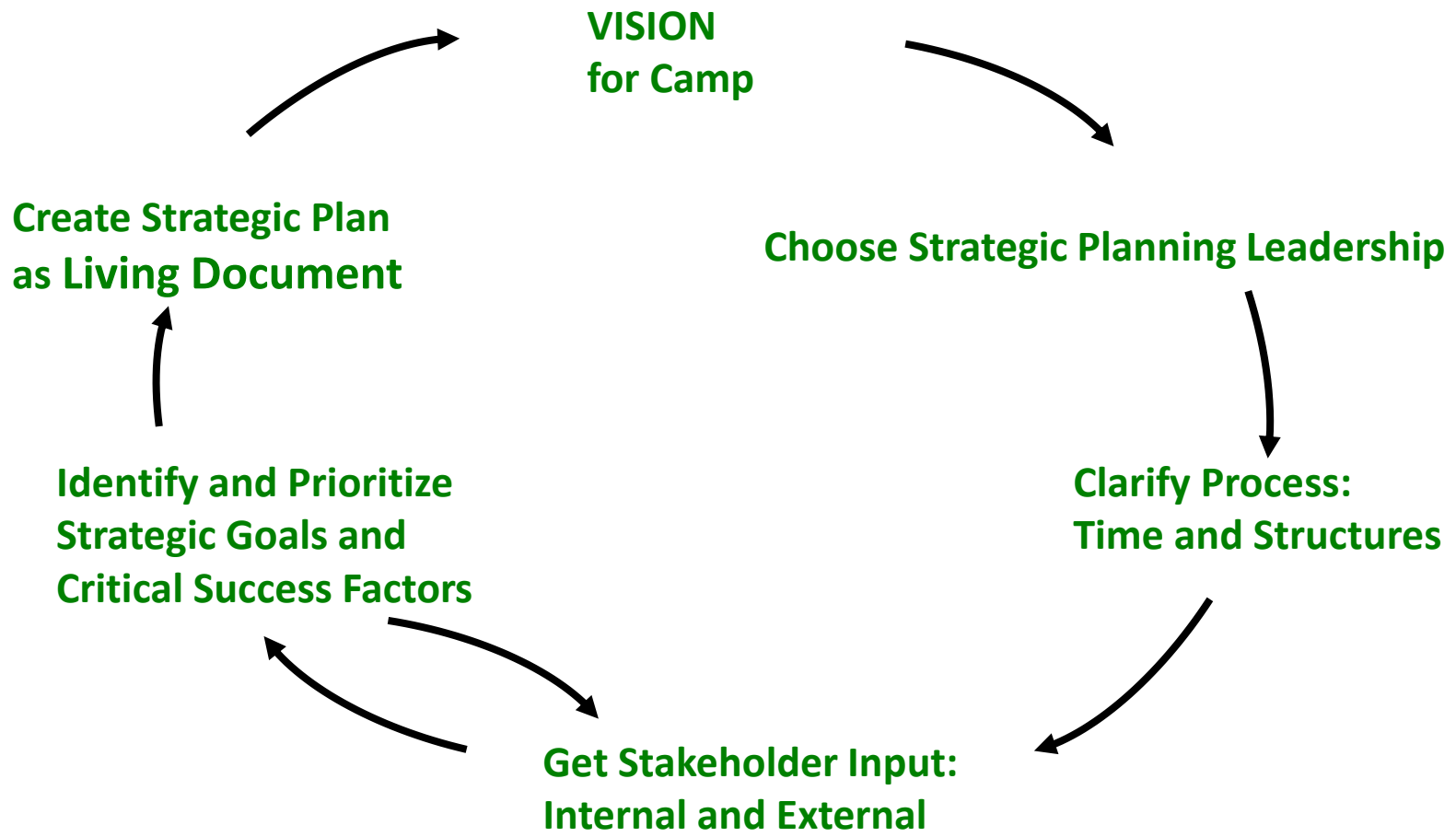
Current Status:

Opportunity Statement:



Action Item	Time	\$	Who

Continuous/ongoing process



What's the difference?

Legacy Plan

Mission Statement

Case Statement

Management Plan

Target Audiences & Prospects

Marketing Plan

Stewardship & Recognition

Strategic Plan

Participatory from outset

Organization-wide, but not
exhaustive



*"No, what I said was we need more stakeholders."
Christy Martin, Cullowhee, N.C.*

What's the state of Strategic Planning at your institution?

- Zilch
- Just finished a great one
- Ready to re-new it
- Parent org is doing one, but it doesn't include Legacy
- Other?

How does your Legacy Plan currently connect?

Exercise: Integrating Legacy

Thinking of your “Legacy Plan” as a “Strategic Plan” ...

- a) How can Legacy **support** your institution’s existing priorities, and

- a) How can Legacy **benefit from** your institution’s existing assets?

Management Protocol

<i>When?</i>	<i>What?</i>	<i>Who?</i>
Every 3-5 years	Major assessment and revision of strategic plan	All stakeholders
Annually	Evaluation, performance report, presentation	Staff to board
Quarterly	Progress review	Governance Committee
Monthly	Progress assessment	Senior staff
As needed	Staff meeting discussions	All staff



KNOWLEDGE CENTER

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- » Legacy Fundraising
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Knowledge Center

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Strategic Planning

This section of the Knowledge Center contains articles, samples, and tools to help organizations plan, organize, and follow-through on the strategic planning process.

Any other resources you'd like to see here? Please send us your [suggestions](#).

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- » [Mission/Vision Statement \(2\)](#)
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- » [More Tips and Resources \(4\)](#)

Strategic Planning

Developing and implementing visionary strategic plans

WHY STRATEGIC PLANS

CORE STRATEGIES

SITE PLANNING

SAMPLES

A strategic plan makes it much easier to unify your organization behind a set of shared goals for strengthening your camp. A strategic plan creates a road map tailored to your vision and needs.

These resources will help guild your organization through planning, writing, and implementing strategic plans.

JCamp 180 mentors are here to help every step of the way, to facilitate retreats or workshops or plan the review process.