

Developing a strategic plan for your organization

– A road map for the future

Few of us would get in the car to take a trip without a road map, unless we know how to get where we're going. Strategic planning serves as a road map to help an organization or business figure out how to get where it wants to go. The process includes examining strengths, weaknesses, opportunities, and threats, and then planning future operations in a prioritized and realistic manner. This workshop will provide an overview of how to get ready for and undertake the strategic planning process so as to create a road map that your organization can follow and get to its desired destination.

Presenter

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Introduction

How strategic planning is like going on a trip

Start with the end in mind and plan ahead.

Determine who's going on the trip?

Where do you want to go? Assess your options.

- Niagara Falls
- New York City
- Albany
- Cleveland
- Saratoga Springs
- Adirondacks

What are the group's priorities (especially given time constraints)?

What mode of transportation will you use? Who's driving?

Consider factors that may affect your trip – how well you're prepared (e.g. hiking clothes) weather, time, cost, crowds, etc.

How will you know if you're on the right road? What sort of road signs or milestones will you look for?

How will you know when you get there?

How will you evaluate the trip and decide if you want to go back to certain places, or if you want to go somewhere else?

Overview

Simply put, strategic planning helps determine

- Where an organization intends to go over a pre-determined period of time
- How it plans to get there – what it needs to do to get there
- How it will know if it got there, or if it's on the right path

Strategic plan vs. business plan

- The focus of a *strategic plan* is usually on the entire organization, and is considered a living and dynamic process
- The focus of a business plan is usually on a particular product, service or program, for a fixed period of time

Do what works, be realistic, customize your process, and do what works

- There are a variety of perspectives, models and approaches that can be used in strategic planning. The way that a strategic plan is developed depends on the nature of the organization's leadership, culture of the organization, complexity of the organization's environment, size of the organization, expertise of the planners, etc.
- Some plans are scoped to one year, many to three years, and some to five to ten years into the future. Some plans include only top-level information and no action plans. Some plans are five to eight pages long, while others can be considerably longer.
- Quite often, an organization already knows much of what will go into a strategic plan. However, development of the strategic plan greatly helps to clarify the organization's plans and ensure that key leaders are all "on the same script".
- More important than the strategic plan document, is the actual strategic planning process.

Benefits of strategic planning

- Clearly defines or confirms the purpose of an organization
- Establishes realistic goals and objectives consistent with the purpose
- Communicates goals and objectives to the organization's constituents

- Ensures effective use of the organization's resources by focusing on key priorities
- Provides a base from which progress can be measured and establishes a mechanism for informed change when needed
- Brings people together to share and work on a common purpose and vision, e.g. board, managers, staff, volunteers, customers

Timing and Scope

The timing and scope of the strategic planning process depends on the nature and needs of the organization and its immediate external environment

- In a highly-dynamic marketplace, planning should be carried out more frequently (once or even twice a year) and done in a comprehensive manner with attention to mission, vision, values, environmental scan, issues, goals, strategies, objectives, responsibilities, time lines, budgets, etc.
- If an organization has been around for many years and is in a fairly stable marketplace, then planning might be carried out once a year, focusing on certain parts of the plan

Common Types of Strategic Planning

Issues-based strategic planning is more commonly used by organizations in a dynamic or competitive marketplace and examines

- Specific issues facing an organization, e.g. finances, competition, marketing, staffing
- Short-term strategies to address those issues
- Action plans to carry out the strategies

Goals-based strategic planning (the most common type) is typically used by organizations in a stable marketplace and focuses on an organization's

- Purpose (could also include vision and/or values)
- Goals to work towards the purpose
- Strategies to achieve the goals
- Action plans (who will do what and by when)

Basic Strategic Planning Process

The following is a basic process that is typically followed by organizations that are small, busy, and have not previously done a lot of strategic planning before.

1. Determine who will be involved in the process
2. Determine if the focus of the plan will be issue-based or goals-based
3. Determine the scope of the planning process
4. Determine a timeline for the planning process
5. Select a facilitator – preferably someone who is objective and impartial
6. Identify or confirm your purpose or mission statement – concise statements that describe why your organization exists, its reason for being. The statement should describe the customer or community needs to be met, for whom, and how.
7. Conduct a brief internal and external assessment – what’s going on?
 - Identify SWOTs – Strengths, Weaknesses, Opportunities, Threats
 - Consider surveying constituents and stakeholders for their opinions and ideas by using a written questionnaire or evaluation
8. Identify, list, and prioritize the major issues and goals the organization must reach if it is to accomplish its purpose. Common categories include finance, administration, facilities, products and services, sales, customer satisfaction, marketing/advertising, partnerships, and personnel/staffing.
9. Establish action plans and strategies to address major issues and goals– objectives/targets, actions, resource needs, timelines, roles and responsibilities
10. Develop a written planning document that can be used to track progress, record results, and communicate status to stakeholders
11. Coordinate the strategic plan with the budget process, e.g. staffing increases/decreases, purchases, sales, etc.
12. Implement, monitor, and update the plan
 - Expect the board of directors and committees to use the plan as a guide for their responsibilities and work, and to report on their progress
 - Refer to and review the status of the plan at board and committee meetings
 - Regularly review, assess and refresh the plan so that it becomes a living document (be sure to keep an archived copy of the original plan).
 - Regularly dedicate time to work on the strategic plan.

SWOT Analysis

Strengths – internal factors that allow an organization to take advantage of opportunities and excel in the marketplace

Weaknesses – internal factors that stand in the way of an organization taking advantage of opportunities or excelling in the marketplace

Opportunities – real or potential external situations and conditions that an organization could take advantage of, given the right circumstances and planning

Threats – real or potential external situations and conditions that could limit an organization's effectiveness and competitiveness, if not dealt with in a pro-active manner

Your Organization

Internal	External
Strengths	Opportunities
Weaknesses	Threats

Important – allow time to step back to evaluate and validate the SWOT analysis before going forward with strategic planning