

STRATEGIC PLANNING

Organizations with a good strategic plan are more successful. The plan provides a roadmap for leadership and staff. They work as a team to achieve consistent goals over several years. The *Strategic Planning* guide describes the preparations for planning, developing the plan, and implementation.

Why Have a Strategic Plan

1. **Roadmap** – The plan identifies the “destination” and guides the board of directors, committees and staff.
2. **Continuity/Sustainability** – Without a plan the organization is susceptible to mission drift and simply being reactionary.
3. **Prioritization** – Planning allows leaders to identify the important issues and programs; and to drop programs that are ineffective or irrelevant.
4. **Allocation of Resources** - Planning is the disciplined allocation of resources (time and money).
5. **Assignment and Timelines** – Good plans include performance measures and assignments indicating how and when projects will be done.
6. **Awareness** – The plan should be compelling to members and stakeholders.

Terminology of Planning

Understanding of and consistent use of terminology is important to guide discussions.

Mission – The purpose for existence; crisp sentence or two – easy to articulate.

Vision – Statement of aspiration; how the organization will affect the future of the organization, community or stakeholders (members.)

Values – Guiding principles of the leadership and staff.

Goals – The core competencies to which resources will be allocated. In setting goals, consider the acronym SMART - Specific, Measurable, Attainable, Relevant and Timely.

Strategies – Approaches and programs for achieving the mission and goals.

Tactics – Assignments, accountability and deadlines.

Performance Measures – Methods to measure progress.

Business Plan – An annual detailed program of work linked to the strategic plan.



Trends in Planning

- Set just 3 to 7 goals; allowing the organization to focus efforts on its core competencies.
- A mission statement that is visionary can replace the need for separate mission and vision statements.

- Promote the plan to members and prospects by converting it to a brochure or posting on the website.
- Report on the plan’s progress by reviewing at board meetings and at least annually.

Span of the Plan

3- 5 Years

Most plans span three years. Planning annually tends to cause short-term thinking. Plans exceeding 5 years may be unrealistic in rapidly evolving environments.

Planning Retreat

With preparation, focus and the right set up a strategic plan can be developed in a day or two. Because discussions will be intense, it is best to do the plan over two consecutive days --- giving everyone a relaxing break after the first day.

The room should be set up in an open-U, with a flip chart at the front. Ensure that seating is comfortable, and food and amenities are nearby. Natural light is preferred to a room without windows.

Brand Statements

The mission, as well as vision and values, serve as a “promise” to the community. The statements help to distinguish the organization. While the vision

and values are optional, the mission or purpose statement is required.

50,000 Foot Perspective

Encourage discussions to remain at the 50,000 foot level. There is tendency for discussions to drop to 25,000' (committee work) or lower, say 10,000' (staff work and tactics.) Leave the tactics to committees and staff. Stay out of the "weeds" at the planning retreat.

Facilitation

An experienced facilitator involves everybody in discussions, while focusing on completing the planning in the time allotted. There are *disadvantages* to having the staff or a board member facilitate. A plan's success may be linked to the right facilitator. Provide the facilitator with all the information they need to understand the organization.

Environmental Scan

Planning is not done in a vacuum; there are environmental influences. Directors should be qualified to recognize trends and community needs. Often the discussion is built around the acronym SWOT – Strengths, Weaknesses, Opportunities and Threats.

Surveys and focus groups may be conducted to gain valuable stakeholder input.

Strategy or Tactic

What's the Difference?

Strategies are innovative approaches to achieving the goals. They often identified as

programs, issues, priorities, benefits, events and services.

Tactics are a lower level discussion – how will it occur, who will do it? Tactics are the responsibility of committees, staff and consultants. Tactics are usually set *after* strategic planning.

Precautions

Plans fail for many reasons:

- Too many people at the planning retreat; 15 to 20 are ideal for meaningful discussions.
- Too many goals – simply a list of what the board wants to see finished. Successful organizations focus on just 3 to 7 goals.
- Short term thinking; it's not a strategic discussion if leaders cannot think beyond their terms of office.
- An inexperienced facilitator or one with a personal agenda.
- No final report formatted as a strategic plan.
- Meetings over several months rather than completing the plan in one sitting.
- Distractions during the planning meeting.
- The wrong people at the planning table; it is a responsibility of the board of directors who should be visionary leaders.
- Failure to include performance measures and timelines.
- Leaders and staff ignore the plan and go back to doing things as before

Implementation after the Retreat

There will be a temptation to put aside the new plan and return to daily tasks. Focus on implementation and integration into the culture of the organization.

- Appoint a "Plan Champion" to monitor and report on progress.
- Align every committee under the goal areas.
- Add performance measures and deadlines.
- Promote the plan to members and stakeholders.
- Create a yearly program of work for committees aligned with the strategic plan.
- Promote the plan at meetings and on the website.
- Include the plan on the board agenda.
- Conduct an annual review of progress.
- Share with the staff to get their buy-in of the board's strategic direction.

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850/570-6000 FAX 850 297-2800

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