

Strategic Planning

ABC's of Strategic Planning:

- A. Who and what are we, what do we do now, and why?
- B. What do we want to be and do in the future, and why?
- C. How do we get from here to there?

Step #1:

INITIATE AND AGREE ON A STRATEGIC PLANNING PROCESS

Purpose: Make decisions about strategic planning effort

Outcomes:

- Who should be involved
- Develop process & timeline
- Formation of 'Planning Team'
- Commit necessary resources
- Determine 'Champion' & 'Sponsor'
- Assign roles & responsibilities
- Ground rules for group process

Step #2:

CLARIFY ORGANIZATIONAL MANDATES

Purpose: Clarify the nature and meaning of mandates – both formal and informal- that the dept. is required to meet.

Outcomes:

- Compilation of the dept.'s mandates
- Interpretation of what is required by the mandates
- Clarification of what is not ruled out by the mandates (expectations)

Step #3:

STAKEHOLDER ANALYSIS; DEPARTMENT MISSION AND VALUES

Purpose: Identify and understand stakeholders; develop and/or refine mission and organizational values.

Outcomes:

- An inclusive list of STAKEHOLDERS and their importance to the department.
- A draft Mission Statement
- A STATEMENT of organizational values

Stakeholder defined: ‘A stakeholder is any person, group or organization that can place a claim on the organization’s resources, attention, or output, or is affected by its output’

‘Who you affect...who affects you?’

Mission statement defined: Organization’s reason for existence=what an organization does.

Set forth:

- Purpose
- Core Function
- Reason for being, your ‘work’
- Unique service, skill, ability
- Intentions towards clientele to be served

Consider inviting internal stakeholders to provide input
(ex: “uncompromising personalized service”)

Step #4:

ASSESS THE ENVIRONMENT TO IDENTIFY STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS (SWOT)

Purpose: Lays the foundation for identifying issues and effective strategies

Outcomes:

- Lists of internal strengths/weaknesses AND external opportunities/threats
- Key background reports (context)
- Specific actions to deal w/ threats & weaknesses
- Thoughtful discussions w/ internal stakeholders concerning SWOT and their implications

Prior to doing SWOT, assess your current situation:

- Trend analysis
- Demographics
- Financial reports
- Focus groups/surveys
- Community input ‘Listening’ sessions
- Agency assessment tool (handout)
- Annual reports

Collect info, synthesize and educate yourself & others → Do SWOT

Step #5:

IDENTIFY AND FRAME STRATEGIC ISSUES

Purpose: 'Heart of Strategic Planning' I.D. Fundamental challenges facing department/organization.

Outcomes:

- An inclusive list of strategic issues faced by the organization
- Issues are prioritized

Step #6:

STRATEGY FORMULATION

Purpose: Create a set of strategies to address each issue from step 5.

Outcomes:

- Grand strategy for department as a whole
- Division or sub-unit strategy statements
- Program, service or product strategies
- Draft strategic plans
- Action planning, begin

Step #7:

REVIEW AND ADOPT STRATEGIC PLAN

Purpose: To reach and official organizational decision to adopt and proceed with strategic plan

Outcomes:

- Widely shared agreement of plan among key decision makers to adopt & proceed with implementation
- Provision of necessary resources for implementation
- Shared sense of excitement about substance & symbolism of the plan

Step #8:

VISION STATEMENT

Defined:

1. Organization's desired future
2. Contains broad outcome statements
3. Focus on outcomes desirable for community rather than department/organization
4. Should be positive, inspiring & challenging
5. Envision 3-5 years into future

Step #9:

PLAN IMPLEMENTATION

Purpose: Develop an effective implementation process

Outcomes:

- Clear understanding of what needs to be done, by whom, when & why
- Introduction & merging of strategic plan priorities into existing department/organization priorities
- Completed action plans

Step #10:

REASSES STRATEGIES AND EVALUATE

Purpose: Review implemented strategies and strategic planning process

Outcomes:

- Assurance that implemented strategies remain effective to real needs/problems
- Evaluation of next round of strategic planning

THINGS TO REMEMBER:

- Some of this is an art
- Your plan will only be good if it can be implemented
- Consider SWOT analysis as a very important step
- Look for opportunities to include stakeholder input
- Have a significant sponsor
- Have a significant process Champion
- Identify facilitator
- Beware of shelf product

FINAL POINTS:

- The importance of pre-planning cannot be over stated
- Be flexible and creative in your process

- After you do an initial strategic plan, there may be no need to do all steps in future plans
- Action planning → frequently revisit
- Planning never stops, it is an ongoing process