



What and How...Strategically Planning Your Success...An Introduction

Strategic Planning determines where the **organization** is going over the next year or more, how it's going to get there and how it will know if it got there or not. The focus of a strategic plan is usually on the entire organization.

Strategic Planning assumes organizations, operate in a constantly changing environment that must be monitored and adjusted to in terms of strategic directions and activities.

A **Strategic Plan** may be 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; others include measurable objectives, actions, timelines and resources. Some plans are five to eight pages long, while others can be considerably longer.

Strategic Planning can be exhilarating when coming up with new visions and missions and values, talking about long-standing issues and coming up with new and exciting opportunities. But without careful action planning -- and diligently ensuring actions are carried out -- the plan ends up collecting dust on a shelf.

A **Strategic Plan** may include deciding who is going to do what and by when and in what order for the organization to reach its strategic goals.

Why we plan... If you fail to plan, you plan to fail

An organization must be clear about its motivation before beginning a strategic plan. There are many benefits, including:

- Clarification of the mission to all stakeholders,
- Assess, reassess and adjust programs or services,
- Reaffirm that an organization is headed where it wants to go or should be going,
- Engage stakeholder and coalition members...get them on the bus,
- Develop a framework within which to make difficult programmatic and financial decisions,
- Maximize financial and human resources,
- Address external uncertainties and change,
- Garner financial support, build teamwork, communication and expertise among members,
- Measure organizational effectiveness by incorporating evaluation into the process.

***Be ready for change, growth,
revitalization
and new vision!***

Sustaining Success –Strategic Planning

Mission Statements

A mission statement is the reason an organization exists, the need it is meeting in the community. A mission statement captures the reason and the need and adds a simple, powerful statement of what the organization is doing to meet those needs.

Key Questions

What does the community need?

What population does the organization want to serve?

Why do we want to serve them?

What needs will the organization address?

What kinds of programs will be developed to meet those needs?

Characteristics of a Mission Statement

A compelling mission statement tends to have the following characteristics:

- It used bold, clear, memorable language
- It conveys the organizations values
- It has both an emotional and a rational impact.
- It combines a “why” statement with a “what” statement.
- It describes the need being met in positive, not negative, terms
- It inspires people to act, give, join, serve and learn more
- It can be adapted for both marketing and development.
- It is succinct

Once a statement is drafted

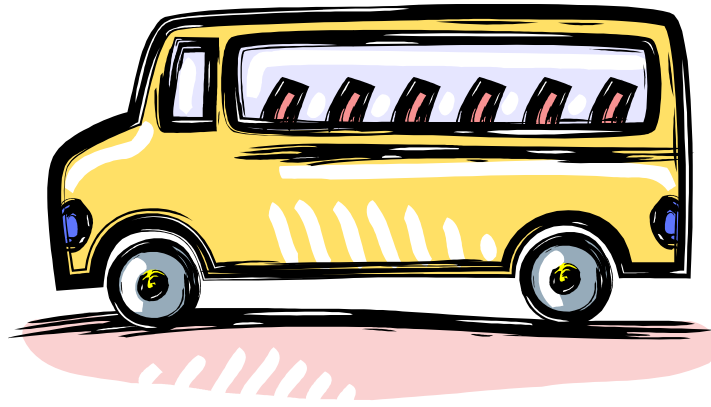
Is it broad enough to allow flexibility, but avoid mission drift?

Is it as succinct as possible and short enough for people to remember and repeat?

A great Mission Statement:

- Describes the purpose for which your organization exists.
- Prevents Mission drift
- Promotes your organization and to help convey the essence of what you are all about.
- Answers "Why did we start this organization?"(The answer will be your first try at writing your mission statement.)

To carry out your mission, you will develop tactics and objectives. All of these will be part of your strategic plan. But first, pay attention to writing a clear, succinct, and inspiring mission statement. It will pay off in the end and keep you from wasting time and resources on non-essential activities.



Who is on your Bus?

County Elected Officials

Chamber of Commerce

Childcare Providers

Business, Industry and Employers

K-12 Educators

Seniors and Retirees

City Elected Officials

School Administration

Law Enforcement

Community Nonprofits

Healthcare

Media

Faith Community

Who else?

Characteristics and skill sets you need to make your effort successful? Who needs to be on your bus?

Who do you need to ask?

Who will ask this person?

Sustaining Success –Strategic Planning

Strengths/Weaknesses/Opportunities/Threats Analysis

SWOT Analysis is a simple but powerful framework for analyzing your organization’s Strengths and Weaknesses, and the Opportunities and Threats you face. The SWOT helps you to focus on your strengths, minimize threats, and take the greatest possible advantage of opportunities available to you.

Strengths (Capitalize)	Weaknesses (Neutralize)
<i>Internal to the Organization</i>	
<p>What do you do well? What do you do better than anyone else? What unique resources do you have access to? What do others see as your strengths?</p>	<p>What could you improve? What should you avoid? Do you have adequate resources – human and fiscal?</p>
Opportunities (Capitalize)	Threats (Neutralize)
<i>External to the Organization</i>	
<p>What interesting trends are you aware of? Are there changes in policy, population, technology, or social patterns that impact your organization positively?</p>	<p>What obstacles do we face? Are there changes in policy, population, technology or social patterns that impact us negatively?</p>

Fist-to-Five Consensus-Building

INTRODUCTION: When a group comes to consensus on a matter, it means that everyone in the group can support the decision; they don't all have to think it's the best decision, but they all agree they can live with it. This tool is an easy-to-use way to build consensus among diverse groups.

DIRECTIONS: Whenever a group is discussing a possible solution or coming to a decision on any matter, Fist-to-Five is a good tool to determine what each person's opinion is at any given time.

To use this technique the Team Leader restates a decision the group may make and asks everyone to show their level of support. Each person responds by showing a fist or a number of fingers that corresponds to their opinion.

Fist

A no vote - a way to block consensus. I need to talk more on the proposal and require changes for it to pass.

1 Finger

I still need to discuss certain issues and suggest changes that should be made.

2 Fingers

I am more comfortable with the proposal but would like to discuss some minor issues.

3 Fingers

I'm not in total agreement but feel comfortable to let this decision or a proposal pass without further discussion.

4 Fingers

I think it's a good idea/decision and will work for it.

5 Fingers

It's a great idea and I will be one of the leaders in implementing it.

If anyone holds up fewer than three fingers, they should be given the opportunity to state their objections and the team should address their concerns. Teams continue the Fist-to-Five process until they achieve consensus (a minimum of three fingers or higher) or determine they must move on to the next issue.)

Adapted from Fletcher, A. (2002). *FireStarter Youth Power Curriculum: Participant Guidebook*. Olympia, WA: Freechild Project.

Note: This method can be used as the primary decision-making method until the leader or group feels that any further dialogue is not advancing the thinking or agreement of the group. Another decision-making method can then be employed; e.g. majority vote.

Sustaining Success – Strategic Planning

Goal Development and Strategic Plan Structure

The difference between where we are (*current status*) and where we want to be (*vision and mission*) is what we do (*goals, objectives and action plans*).

Setting goals and objectives builds on the previous steps of vision/mission and taking stock of where your organization is (SWOT Analysis). Goals are simply a clearer statement of the vision/mission, specifying the accomplishments to be achieved if the vision is to become real. The objectives are clearer statements of the specific activities required to achieve the goals, starting from the current status.

At this point, strategic planning begins to produce lots of ideas and action steps. A common practice for keeping individual workloads to a manageable level is to delegate different topics to different teams.

A strategic plan is a living document, one that changes as your situation changes. So remember to use it, don't leave it on the shelf. Don't bite off more than you can chew and start with the end in mind.

Next Steps:

1. While reviewing your SWOT analysis and vision/mission, develop **one goal** that you want to accomplish with in the next year. Utilize your strengths and recognize your opportunities while minimizing your weaknesses and threats.
2. Use brainstorming to develop a list of possible goals. To decide which goal to address first, use the Fist-to-Five method if a decision is not forthcoming.
3. Draft Objectives and Strategies to accomplish this goal. Remember to assign responsibilities and timelines.
4. Use the strategic plan format to complete this task.

Strategic Plan 2010-2012

Vision:

Mission:

Goal:

Objective:

Strategies	Performance Measurement	Responsibility	Resources (Who, What, How)	Timeline

Strategies	Performance Measurement	Responsibility	Resources (Who, What, How)	Timeline



Characteristics of a Successful Strategic Plan

1. A living, changing document that is used at meeting regularly to insure the organization is on the defined strategic path.
2. A realistic and comprehensive assessment of SWOT analysis.
3. A clear and comprehensive grasp of external opportunities and challenges.
4. An inclusive approach.
5. An empowered planning committee.
6. Involvement of key leadership and stakeholders.
7. Sharing responsibility by board and staff members.
8. Learning from best practices.
9. Clear priorities and implementation.
10. Patience.
11. Commitment to Change.