

Strategic Planning 201

Bringing Your Strategic Plan to Life



Supplemental Handout Package

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STRATEGIC PLANNING

A strategic plan sets the direction for the organization in the mid- to long-term future. It spells out the organization's mission statement, primary goals, and measurable objectives, and explains the basic strategies for fulfilling the mission and achieving the goals. The table of contents of a strategic plan is one way to view the value of strategic planning.

Contents of a Strategic Plan

1. Current situation (E-scan, SWOT, etc)
2. Values
3. Vision
4. Mission Statement
5. Goals
 - A. Objectives
(WHAT is measurable)
 - B. Strategies
(HOW goals are achieved)
6. Action plans by function
 - A. Resource allocations
 - B. Controls (Measures, accountability, indicators)

***Board driven**

BUSINESS PLANNING

The business plan aims to improve the effectiveness of the organization without significantly changing its direction. The business plan may also be used to translate the strategic plan of the organization into a short-term management control tool.

Contents of a Business Plan

1. Business definition / profile / summary
2. Business Organization
 - A. History
 - B. Structure
3. Goals
4. Marketing Plan
5. Management and Labour Plan
6. Finance Plan
 - A. History
 - B. Projected income statement(s)
 - C. Projected cash flow
7. Action plans and controls
 - A. Benchmarks / targets

*** Staff implement**

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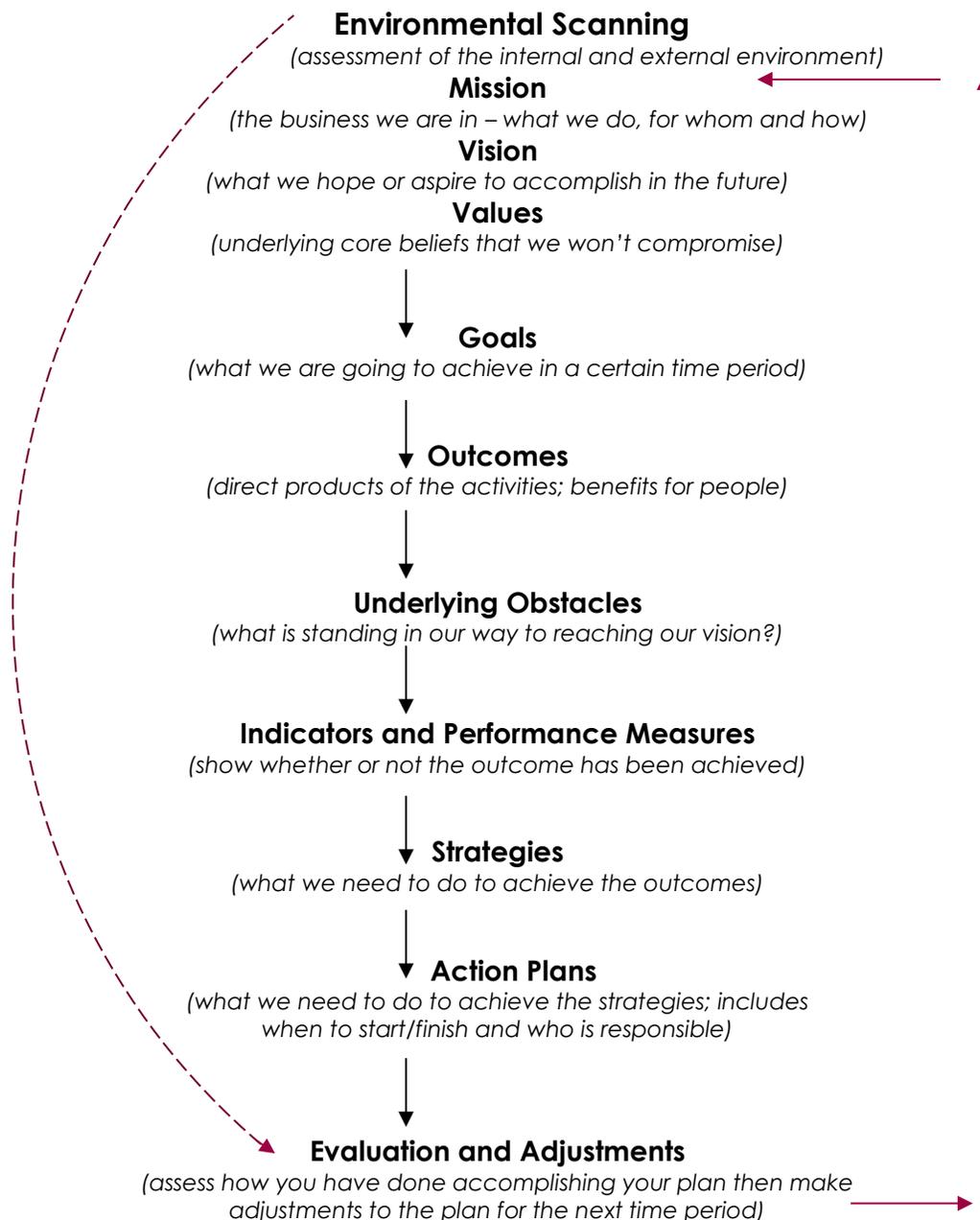
Strategic Planning Overview

Strategic Planning Definition

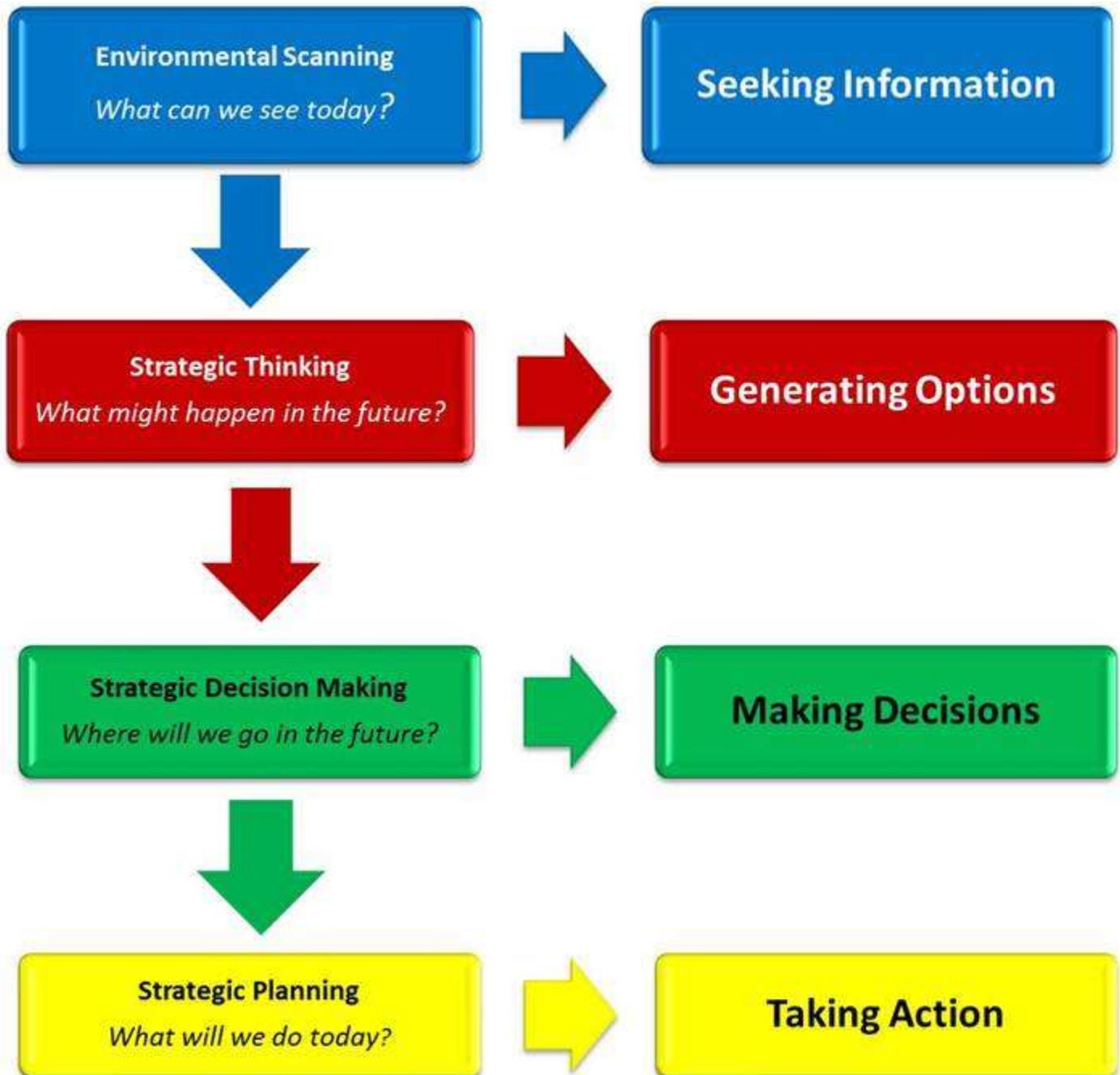
Strategic planning is a systematic, organized, future-oriented process that involves making fundamental decisions that shape and guide what an organization does, why it does it, what results it will focus its energy and resources on achieving, how it will achieve those results and how success will be measured. Simply put, strategic planning determines where an organization is going over the next specified period of time, how it's going to get there and how it will know if it got there or not. The purpose of strategic planning is to provide a road map to guide the organization and decisions it makes.

Elements of Strategic Planning

The following are some elements commonly included in basic strategic planning:



First Strategic Thinking, Then Strategic Planning



Futures Thinking Model by Maree Conway, see thinkingfutures.net for more information. Permission was obtained from M. Conway to use and distribute the Futures Thinking model for this presentation.

Action Planning

An **action plan** lays out what activities or tasks will be undertaken for each goal, who will be responsible or accountable (lead person); when activities will occur (target dates); and what resources will be needed (human, financial, other).

Tips for Writing Action Plans

- Use the information gathered in the environmental scan to inform possible options and strategies
- Think of actions or strategies to capitalize on opportunities or minimize risks identified in the environmental scan
- Incorporate input from many sources such as board, staff, volunteers, clients
- Generate many ideas without evaluation or criticisms; generate as many crazy ideas as possible
- Develop criteria and evaluate your strategies and actions to narrow it down
- Engage in frequent scanning in order to assess ongoing viability of action plan

Action Planning Considerations:

What is the issue or goal?

What barriers/challenges need to be overcome?

What solution/ or action needs to be done?

Who should take the lead role to ensure this action is carried out?

Who will be involved in doing the work? How?

What is the time period for doing the work?

What resources will be required?

How will you measure success?

Action Planning Chart

GOAL AREA # _____ : _____

General STRATEGY to achieve the goal area (the “what”)	Specific STEPS or TASKS to achieve the strategy (the “how”)	Responsibility (the “who”)	Start Date & Finish Date (the “when”)	Resources required (the “with what”)	Measurement (how will we know we have succeeded? “Indicator”)

Implementation, Monitoring, Evaluation

Implementation

- Adopt The Plan Formally
- Assign A Plan Coordinator
- Establish A Plan Calendar

Monitoring

- have your monthly report linked to your goals
- review the plan every 2- 3 months, status report of where things are
- assign tasks to people
- have the board review the plan each year, and identify priorities for the year

Evaluation

Evaluation is Done to Improve a System, Process or Plan and to Make it Better in the Future

Evaluation has two purposes:

- to determine our progress towards the goals
- to make any changes necessary for the upcoming period

We Evaluate:

- THE PAST - compares what we did with what we said we were going to do
- THE PRESENT - reassess the plan in light of today's situation
- THE FUTURE - are we still headed the same way?

Meeting Agenda

Date & Time

Location

Preparation Work

- Review all information and updates attached to agenda.
- B

Meeting Objectives

- A
- B

Agenda

1. Call to Order
2. Approval of Agenda
3. Approval of Minutes from (date)

Information Only

4. Executive Director's Report *(time allotted)*
5. Strategic Plan Goal “__”:Strategy *(time allotted)*
6. Strategic Plan Goal “__”: Strategy: Action Item *(time allotted)*
7. Other Item *(time allotted)*

Decisions

8. Strategic Plan Goal “__”:Strategy: Action Item *(time allotted)*
DECISION: How to ... whether or not to ... etc.
9. Strategic Plan Goal “__”: Strategy: Action Item *(time allotted)*
DECISION:
10. Other Item *(time allotted)*

Discussions

11. Strategic Plan Goal “__”: Strategy: Action Item *(time allotted)*
QUESTION: How might we begin to explore ... What things do we need to consider ...
etc.
12. Other Item *(time allotted)*

Other

13. New Business
 - a. Specific Item and whether it's information or decision or discussion
14. Adjournment

Next Meeting: date, start time

Keeping your Plan Alive

Strategic plans must be implemented and continually monitored and evaluated. Many cases where plans have failed can be attributed simply to the work not being done. Often this is because the plan was unrealistic to begin with or planners did not assign tasks or provide appropriate resources. Strategic plans are “living” documents. This means they should be constantly monitored, evaluated and updated to respond to organizational or situational changes. Strategic planning does not stop once the document is completed – it continues throughout the complete cycle and then begins anew as organizations celebrate their successes, prepare for planning again, and re-assess their environment in light of their achievements and new challenges.

THE 4x8 IMPLEMENTATION TOOL

1. **UPDATE**
2. **EVALUATE**
3. **DEVIATE**
4. **CELEBRATE**



8 EXCEPTIONAL EXERCISES FOR MOVING YOUR PLAN FORWARD

1. Get To Work: Make Assignments

- Measure.
- Reward and recognize.

Best-laid plans can go to pot if no-one is responsible for results. Make sure that someone is assigned to champion each initiative, that they have a good understanding of what is required of them and what they are meant to accomplish, that they have the resources that they need to move forward, and that the board is monitoring their progress. Not achieving the intended targets may not be a bad thing – it may mean that targets need to be changed, or that more or different resources are required. How will you know if you don't check it out?

Who is your champion? At key points you need to assign leaders who can move the initiative forward and can motivate others to action. While leadership at the top is essential, strong leaders at other key points is also important.

2. Can You Hear Me Now? Communicate Your Plan

- Tell everyone inside your organization.
- Tell key people outside your organization.

People working in your organization need an understanding of the plan. This includes board members, executive, staff, volunteers, and contracted workers. Use your plan to communicate your shared direction and goals – then everyone can work together to move your organization forward!

Use your plan as a communication tool to tell people outside your organization what you do, how you do it, and what you're aiming for. Your plan is a wonderful tool for informing your community about your initiatives and goals.

3. You Are Your Plan: Integrate Planning Into All You Do

- Monitor! Monitor! Monitor!
- Board business and committee meetings.
- Your AGM.

Your plan is really a living document, so make sure it comes alive by bringing it out and following it! Take the key dates and targets from your plan and move them immediately to your agendas. At each monthly meeting, check to see that you are evaluating your progress. Use your plan to tell committee members how they fit in the overall scheme. Before the end of your leadership year, have your outgoing leadership review the plan and communicate the challenges, progress and accomplishments to the members at your Annual General Meeting. Use any and all opportunities to keep your membership involved in your plan. When monitoring your plan, ask the following:

- A. Are goals and objectives still realistic?
- B. Have your priorities shifted?
- C. Are they being achieved or not?
- D. Will they be achieved according to the set timelines?
- E. Do you still have adequate resources to achieve the goal?
- F. What can we learn from our monitoring and evaluation?
- G. What changes need to be made?

4. Planning And Organizational Structure Go Hand In Hand

- Governance.
- Staffing.
- Committees.
- Policies.

Organizations can be held back by structures that don't support what they are trying to do. If your planning takes your organization in a new direction, will your structure support it? Do you have good people on bad committees? A lot of committees that do nothing and one committee that does it all? Are your job descriptions up to date to reflect the work that needs to be done? Remember, form follows function. An organization's structure will enable the organization to carry out its mission and fulfill its vision. Ensure your policies are current, reflect your new plan, are known and understood by your members and staff, and are enforced.

Develop Fabulous Committees

- Involving new members and the community.
- Terms of reference.
- Recruit new leaders.

Committees are by far the most valuable tool for ensuring that the work of the organization gets done and that new people are introduced to and involved in your organization. Learn how to properly set up committees that will move you forward in your plan. Think of committees as farm teams: use them as a way to involve all your members and to get people up to speed on your organization and tested for follow through before you invite them to join the board. Use your plan to let your committees know what you do, where you're going, and how you're going to get there.

5. Manage Your Changes

- What have you changed or what are you doing differently since you've developed your plan?
- How well do you like cats?

DEFINITION OF INSANITY: Trying to get different results by doing the same thing.

Adapt to change by learning to manage it. This doesn't mean accepting unplanned change, but rather anticipating it, preparing for it, and working to direct it. If your plan requires changes, how will you bring everyone on board?

SEVEN SECRETS FOR COPING WITH CHANGE IN SMALL TOWNS

(Adapted from *Helping Small Towns Survive* – Heartland Center for Leadership Development)

1. Believe that you can do it!
2. Take risks! Learn from your successes and failures!
3. Show a bias for ACTION! Sustainable and growing communities don't wait for someone to tell them what to do!
4. Focus on what you can control! You may not be able to control location, but you can always control attitude!
5. Plan for development! Work together with all your community members!
6. Find opportunities where others see threats and challenges!
7. Have a vision for the future and a positive attitude!

6. Deviate From The Plan If You Need To

- It's okay to deviate from the plan.
- Adapt!

The plan is a guideline. It is a road map for getting you where you need to go, but there are a lot of roads that will get you to your destination. If you run into potholes, speed bumps, or washed-out bridges, you'll need to adapt so that you can continue on your journey. As you progress through your plan, you'll need to adapt to changes in your environment, changes to resources, changes to stakeholder needs, and increases in your capacity to get things done.

7. Celebrate Your Progress

- A pat on the back.
- It's not just about the challenges and issues. Recognize your successes, too!
- Blow your own horn!

GET YOUR STORY IN THE NEWS

- Know your audience.
- Know your community. Practice co-opetition.
- Get to know your media.
- Make your story an event.
- Get to the point.
- A picture is worth a thousand words.
- Designate a spokesperson.
- Know the deadlines.
- Follow-up.

Why Plans Fail

- Successes are not celebrated.
- Not based on concrete, workable goals. Activities treated as additions or enrichment, not as core work.
- Failure to anticipate obstacles and develop strategies.
- Lack of systematic monitoring and evaluation system.
- Lack of commitment.
- Ongoing work or operations not included in the plan, resulting in inadequate resources, poor morale, or exhausted staff and volunteers.
- Inflexible plan breaks down under stress of changing circumstances.
- Poor leadership.
- Resistance to change.

Board Recruitment

Ideas for Recruiting New Leaders

(From *Helping Small Towns Survive* – Heartland Center for Leadership Development)

- IDEA 1. Ask “Who’s not here?”
- IDEA 2. Look for skills, not names.
- IDEA 3. Try involvement by degrees.
- IDEA 4. Appeal to self-interests.
- IDEA 5. Use a wide-angle lens.
- IDEA 6. Define the task.
- IDEA 7. Use current leaders to recruit new leaders.
- IDEA 8. Create a history of efficient use of people's time.
- IDEA 9. Offer membership “premiums.”
- IDEA 10. Market your wares.

Sample Skills Matrix

	Team Member A	Team Member B	Team Member C	Team Member D	Team Member E	Team Member F	Team Member G	Team Member H
Competency 1	5	1	3	3	1	4	3	2
Competency 2	4	4	-	2	2	4	3	4
Competency 3	3	2	1	3	-	2	-	3
Competency 4	4	1	4	4	1	4	5	3
Competency 5	4	3	3	4	-	2	1	4
Competency 6	5	5	4	3	-	2	3	5
Competency 7	5	4	1	5	1	3	5	1
Competency 8	4	3	5	1	2	-	4	1