

THE STRATEGIC PLAN: MORE THAN A TEMPLATE...A LIVING DOCUMENT

INTRODUCTION TO STRATEGIC PLANNING

»» What is a Strategic Plan?

A good strategic plan:

- Provides a **framework** for articulating organizational purpose, vision, values and goals.
- Translates hopes and dreams into concrete **plans**.
- Outlines goals and objectives and **strategies** for achievement.

»» Why is Strategic Planning Important?

Strategic planning helps:

- **Clarify direction**, prioritize activities and allocate resources efficiently.
- **Close the gap** between where the organization is and where the organization wants to be in the future.
- **Focus** staff and members on shared vision and common objectives.
- Teams **deliver mission critical programs** and services with consistency and excellence.

»» What are the Essential Elements of the Strategic Planning Process?

- **People**

Adopt an inclusive mindset; get the right people at the table. Pull together a diverse, yet appropriate group of people who represent every area of the organization. Always include at least one person who has authority to make strategic decisions.

- **Preparation**

Conduct basic organizational assessments to understand where the organization is before planning where it should go. Consider engaging a consultant to facilitate not only the strategic planning sessions, but also the pre-planning assessments.

- **Place**

Choose a neutral space that will encourage creative thinking and honest dialogue.

- **Process**

Prepare an agenda. Provide an outline of topics to cover and tools to work through each area. Allow for open and free discussion regardless of position. Use an outside facilitator that can concentrate on the process and ask the tough questions.

DESIGNING A STRATEGIC PLAN

Core elements of a strategic plan:

- »» **Mission:** Why the organization exists.
- »» **Vision:** Picture of the preferred future.
- »» **Strategies:** Practical ideas about how to use resources to achieve goals.
- »» **Goals:** General statement of a long-range purpose.
- »» **Objectives:** Statement of the results to be achieved.
- »» **Action Plan:** Step-by-step plan for accomplishing goals.
- »» **Method of Evaluation:** Milestones, benchmarks, reviews, etc.

EXECUTING THE STRATEGIC PLAN *Implementation Inhibitors*

- Strategic plan not translated into an **action** plan.
- Lack of **leadership**.
- Poor **communication**.
- Difficult time staying focused on **primary objectives**.
- Violation of **rules and processes**.
- Misalignment and lack of **ownership**.
- Plan as a **problem fixer**.
- Low levels of **commitment**.
- Prior **experiences**.
- Inability to set aside personal **agendas**.
- No system of **accountability**.
- Team **incompetence**.
- Shortage of **resources**.

EXECUTING THE STRATEGIC PLAN *Keys for Effective Implementation*

- **Leadership / Ownership:** Leaders must take ownership of the plan and engage in activities that will bring it to life.

Practical Application *Develop leaders throughout the organization*
Establish clear roles, responsibilities and expectations
Assign a “champion” to keep the team focused on tasks and connected to the big picture
Integrate the plan’s goals and objectives into leaders’ performance reviews

- **Communication:** Staff and other members of the organization must hear the vision and strategic plan for achievement multiple times and through multiple channels to internalize it.

Practical Application *Communicate strategically to smaller, targeted groups*
Develop multi media pieces that highlight priorities, activities, etc.
Make discussion of the plan a standard agenda item at key meetings

- **Alignment:** Strategies must be developed to transition the staff and other members of the organization from compliance to ownership.

Practical Application *Document and distribute the plan throughout the organization*
Report major milestones of the strategic plan to staff
Address resistance, challenge complacency, manage conflict

- **Commitment:** The organization and its leaders must stay the course.

Practical Application *Include a plan update on the Board’s agendas to ensure focus*
Meet with teams to inspire ownership and sustain momentum
Reward achievement of goals and objectives

- **Evaluation/ Accountability:** There must be a system for evaluating, reporting and holding the team accountable for plan progress and achievement.

Practical Application *Conduct strategic assessments to review results and performance*
Hold quarterly planning update sessions to review status against plan
Develop comprehensive feedback systems

- **Resource Allocation:** The organization must assign necessary resources to priority areas.

Practical Application *Review the budget and analyze resources allocated to priority areas*
Evaluate how much time key leaders spend on strategic initiatives