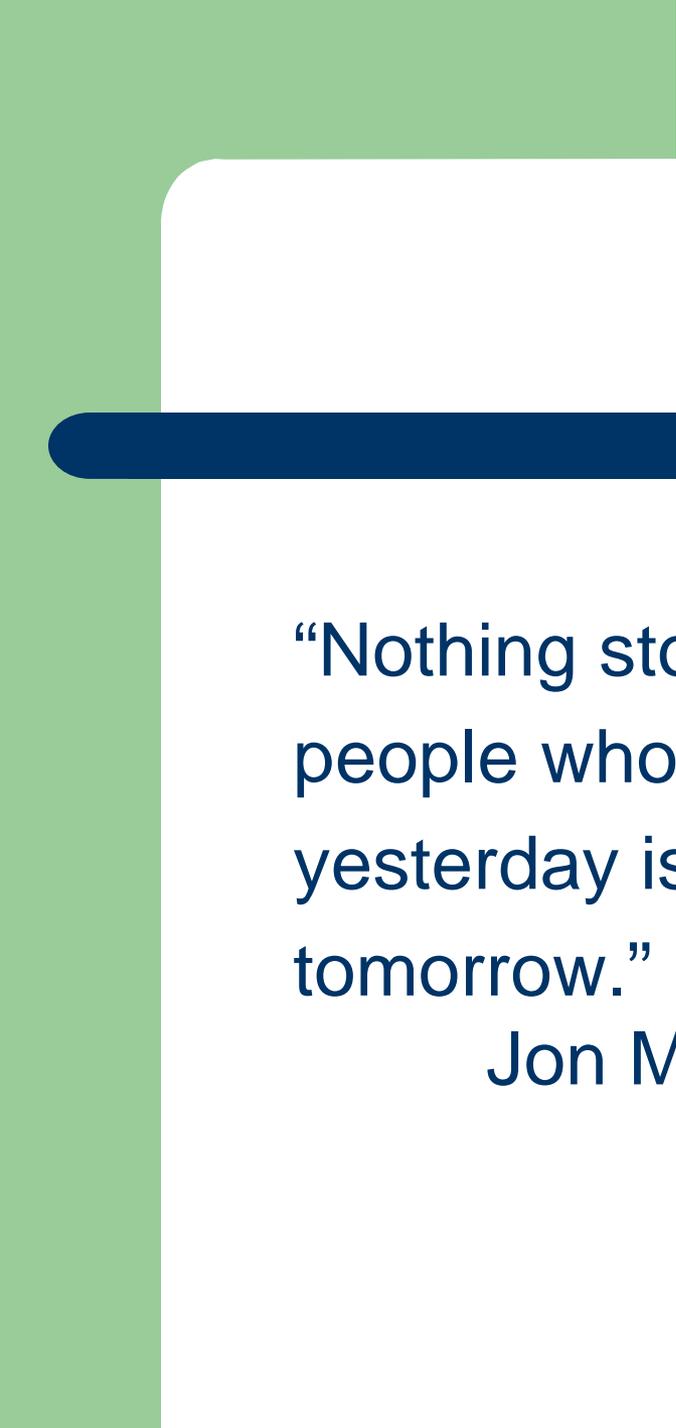


Strategic Planning for Organizations

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A decorative graphic on the left side of the slide, consisting of a light green vertical bar and a dark blue horizontal bar with rounded ends.

“Nothing stops an organization faster than people who believe that the way you worked yesterday is the best way to work tomorrow.”

Jon Madonna

What is Strategic Planning?

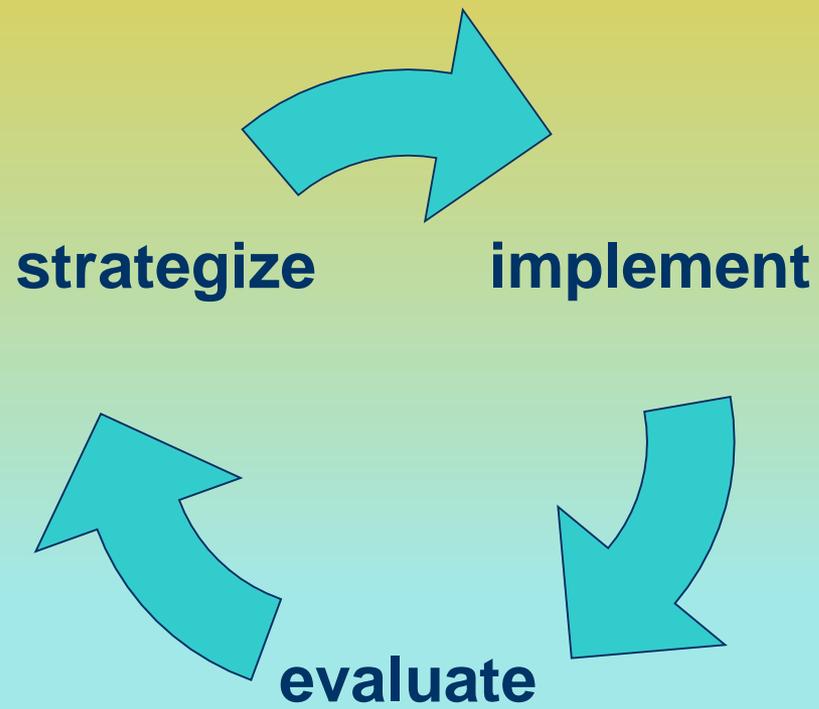
- A systematic process
- Includes agreement and commitment
- Develops priorities essential to the mission
- Responsive to the environment
- Guides the acquisition and allocation of resources

Why Plan?

- Guides leaders in the commitment of doing what is right for the organization at the right time.
- It is both a leadership tool and a management tool.
- It increases the chances that what is done will lead to results.

Strategic Planning Is NOT

- A way to predict the future
- A substitute for the judgment of leadership
- A smooth, linear process



Keys to Effectiveness

- Focus on the most important issues
- Be willing to question all aspects good and bad – there are no sacred cows
- Produce a document
- Work the plan for at least one year

Types of Plans

- Strategic plan
- Long-range plan
- Business plan
- Operational plan

Phases of a Strategic Plan

- Prepare
- Develop mission, vision, and values
- Assess your organization
- Agree on priorities
- Write the plan
- Implement the plan
- Evaluation and monitor the plan

Preparation

- Why do you want to plan?
- Establish the conditions for success.
- How will you gather information?
- From whom? Or what?
- Design the process to meet your needs.
- Write the plan on how you will proceed.

Mission, Vision, Values

- A shared understanding of why you exist and the aspirations for the future.
 - Mission statement
 - statement of purpose
 - Vision statement
 - image of the future we create
 - Values statement
 - guiding concepts, beliefs, and principles

Assessment of Organization

- History
- Profile of organization
- Previous strategies
- Current strategies
- Gathering information
 - Internal stakeholders
 - External stakeholders
 - Documents, sources of information

Agreement on Priorities

- First analyze data, review progress
- Update the work strategy
- Assess with business planning strategy
- Agree on future program strategies and develop the program portfolio
- Confirm the future core strategies
- Agree on administrative, financial, and governance priorities

Write the Strategic Plan

- Develop goals and objectives
- Explore the financial implications of decisions
- Write the document
- Adopt the plan and decide next steps

Implement the Strategic Plan

- Manage change
- Develop a detailed operation plan

Evaluation of the Plan

- Provide guidance in priorities?
- Help in allocation of resources?
- Understandable to those who didn't make the plan?
- Allow understanding of external and internal environments?

Evaluation (cont'd)

- Demonstrate consensus and commitment?
- Pass full adoption?
- Facilitate an effective operational plan?
 - Developed by those responsible
 - A tool to implement, monitor, and reference
 - Operation of strategic plan
 - Realistic

Evaluate and Monitor the Plan

- Evaluate the plan and the plan process
- Monitor progress
- Update the strategic plan

- Mission Statements

- Who you are as an organization?
- Why you exist?
- What you do?
- Whom do you serve?
- What you do not do.

- Two Parts

- Purpose (end)
- Business (means)

- The American Cancer Society
 - Is the nationwide community-based voluntary health organization dedicated to eliminating cancer as a major health problem by preventing cancer, saving lives, and diminishing suffering from cancer, through research, education, advocacy and service.
- The Laura W. Bush Institute for Women's Health
 - Is dedicated to the cultivation and advancement of multi-disciplinary science in women's health and to the promotion of the well-being of women through research, education and community outreach.

- Haight Ashbury Free Clinics, Inc.
 - To increase access to healthcare for all and improve the health and well being of our clients. Haight Ashbury Free Clinics provides free, high quality, demystified and comprehensive health care that is culturally sensitive, non-judgmental and accessible to all in need.
 - “Health care is a right not a privilege.”
- Nike
 - To bring inspiration and innovation to every athlete in the world.

Vision Statements

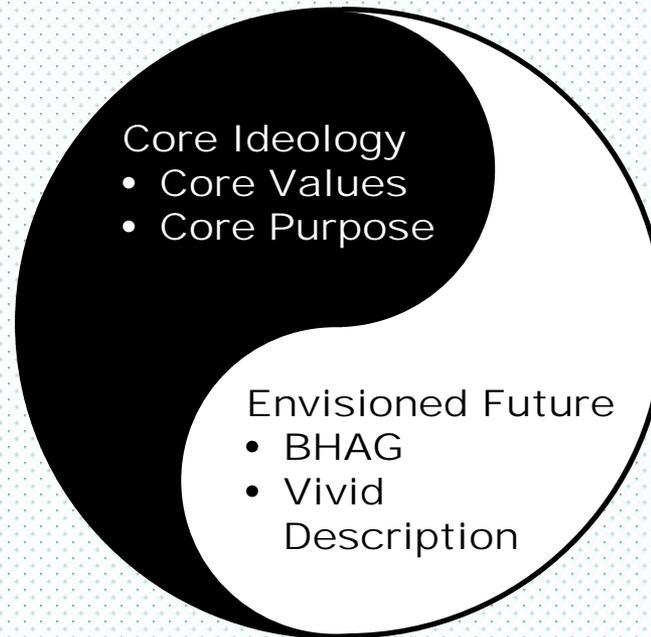
- Inspirational
- What will success look like?
- How will the world benefit from our existence?
- Allows priority setting
- Keeps the organization on track

- “I have a dream” Martin Luther King
- “By the end of the decade, we will put a man on the moon” John F. Kennedy
- “To awaken and nurture the artist in every Texas child” Texas Women for the Arts
- “No child will go hungry to bed in the evening”
Soup Kitchen

Building Company Vision*

Core purpose is the organization's fundamental reason for being.

Values are the organization's essential, non-negotiable tenets



BHAG (pronounced *bee-hag*, shorthand for “Big Hairy Audacious Goal”) is a 10-to-30-year objective—like a big mountain to climb—that serves as a unifying focal point of effort, galvanizing people and creating team spirit. It is crisp, compelling and easy to understand.

Vivid description is a vibrant, engaging, and specific description of what it will be like to achieve the BHAG. Think of it as translating the vision from words into pictures, of creating an image that people can carry around in their heads.

* As defined in *Building Company Vision*: Collins & Porter

Values statements

- Focus on service, quality, people, and work norms
- Come from core values that may or may not be verbalized
- Allow for examination of alignment of the organization with its staff and volunteers

- **Outward Bound**

- Self-confidence is not taught or learned; it is earned by surpassing your own self-set limitations.

- **National Geographic**

- Understanding the world geographically as a youth is a prerequisite to acting with global responsibility as an adult.

- **Miscellaneous**

- Integrity, quality, and excellence in service provision must always be maintained.
- Individuals should be empowered to make educated decisions about their health choices.
- We are client-centered, compassionate, ethical.....

Analysis of Assessment- an example

Opportunities

Threats

Strengths

Invest

Clear matches of strengths and opportunities lead to comparative advantage.

Defend

Areas of threat matched by areas of strength indicate a need to mobilize resources either alone or with others.

Weaknesses

Decide

Areas of opportunity matched by areas of weakness require a judgment call: invest or divest; collaborate.

Damage Control

Areas of threat matched by areas of weakness indicate need to damage control.