

# Developing a strategic plan for your organization:

## A road map for the future

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### Overview

#### Simply put, strategic planning helps determine

- Where an organization intends to go over a pre-determined period of time
- How it plans to get there – what it needs to do to get there
- How it will know if it got “there” and if it’s on the right path

#### Strategic plan vs. Business plan

- The focus of a *strategic plan* is usually on the entire organization, and is considered a living and dynamic process
- The focus of a business plan is usually on a particular product, service or program, for a fixed period of time

#### Do what works, be realistic, and customize your process

- There are a variety of perspectives, models and approaches that can be used in strategic planning. The way that a strategic plan is developed depends on the nature of the organization's leadership, culture of the organization, complexity of the organization's environment, size of the organization, expertise of the planners, etc.
- Some plans are 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. Some plans are five to eight pages long, while others can be considerably longer.
- Quite often, an organization already knows much of what will go into a strategic plan. However, development of the strategic plan greatly helps to clarify the organization's plans and ensure that key leaders are all "on the same script".

## **Benefits of strategic planning**

- Clearly defines or confirms the purpose of an organization
- Establishes realistic goals and objectives consistent with the purpose
- Communicates goals and objectives to the organization's constituents
- Ensures effective use of the organization's resources by focusing on key priorities
- Provides a base from which progress can be measured and establishes a mechanism for informed change when needed
- Brings people together to share and work on a common purpose and vision, e.g. board, managers, staff, volunteers, customers

## **Timing and Scope**

The timing and scope of the strategic planning process depends on the nature and needs of the organization and its immediate external environment

- In a highly-dynamic marketplace, planning should be carried out more frequently (once or even twice a year) and done in a comprehensive manner with attention to mission, vision, values, environmental scan, issues, goals, strategies, objectives, responsibilities, time lines, budgets, etc.
- If an organization has existed for many years and is in a fairly stable marketplace, then planning might be carried out once a year, focusing on certain parts of the plan

## Common Types of Strategic Planning

**Issues-based strategic planning** is more commonly used by organizations in a dynamic or competitive marketplace and examines

- Specific issues facing an organization, e.g. finances, competition, marketing, staffing
- Short-term strategies to address those issues
- Action plans to carry out the strategies

**Goals-based strategic planning** (the most common type) is typically used by organizations in a stable marketplace and focuses on an organization's

- Purpose (could also include vision and/or values)
- Goals to work towards the purpose
- Strategies to achieve the goals
- Action plans (who will do what and by when)

## Basic Strategic Planning Process

1. Determine who will be involved in the process
2. Determine if the focus of the plan will be issue-based or goals-based
3. Determine the scope of the planning process
4. Determine a timeline for the planning process
5. Select a facilitator – preferably someone who is objective and impartial
6. Identify or confirm your purpose or mission statement – concise statements that describe why your organization exists, its reason for being. The statement should describe the customer or community needs to be met, for whom, and how.
7. Conduct a brief internal and external assessment – what's going on?
  - Identify SWOTs – Strengths, Weaknesses, Opportunities, Threats
  - Consider surveying constituents and stakeholders for their opinions and ideas by using a written questionnaire or evaluation

8. Identify, list, and prioritize the major issues and goals the organization must reach if it is to accomplish its purpose. Common categories include finance, administration, facilities, products and services, sales, customer satisfaction, marketing/advertising, partnerships, and personnel/staffing.
9. Establish action plans and strategies to address major issues and goals— objectives/targets, actions, resource needs, timelines, roles and responsibilities
10. Develop a written planning document that can be used to track progress, record results, and communicate status to stakeholders
11. Coordinate the strategic plan with the budget process, e.g. staffing increases/decreases, purchases, sales, etc.
12. Implement, monitor, and update the plan
  - Expect the board of directors and committees to use the plan as a guide for their responsibilities and work, and to report on their progress
  - Refer to and review the status of the plan at board and committee meetings
  - Regularly review, assess and refresh the plan so that it becomes a living document (be sure to keep an archived copy of the original plan).
  - Regularly dedicate time to work on the strategic plan.