



# Strategic Planning

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2022 President Elect Training





# Overview



Definition and Goal



Setting Up for Success



Initial Steps



Deep Dive



Evaluate and Create



Implementation



# What is Strategic Planning?



A systematic process through which an organization agrees on and builds key stakeholder commitment to priorities that are essential to its mission and responsive to the organizational environment. Strategic planning guides the acquisition and allocation of resources to achieve these priorities.

# Goals of Strategic Planning

- Generating an explicit understanding of the organization's mission, strategy, and organizational values among staff, the board, and external constituencies
- Create a blueprint for action based on current information
- Design broad milestones with which to monitor achievements and assess results
- Collect information that can be used to market the organization to the public and to potential sponsors





## Set up for Success:

- Define the scope
- Identify the resources available
- Identify a facilitator - ensure they have a process in place
- Creating the committee - selection based on skills/experience to cover as many differences as possible
- Educating the committee on the process - why it's important and how it will work






## Committee Goals

- Create a forum to discuss why the organization exists and the shared values that should influence decisions
- Foster successful communication and teamwork among the board and staff
- Lay the groundwork for meaningful change by stimulating strategic thinking and focusing on what's most important to the organization's long-term success
- Bring everyone's attention back to what is most important – finding ways to accomplish the organization's mission
- Encourage thinking about how to use the strategic plan to adapt to changing circumstances



# Initial Steps



A horizontal row of light bulbs is depicted against a dark background. Most bulbs are unlit and shown in a simple line-art style. One bulb, positioned towards the right side of the frame, is brightly lit with a yellow glow and radiating lines, indicating it is the 'idea' or 'focus' of the image. A white, cloud-like thought bubble is superimposed over the middle of the row, containing the text 'Why do we exist?'. The bottom of the image features a white, torn-paper-like border.

Why do  
we exist?

Evaluate Your Mission and Vision Statements



# Assess the Affiliate's Current Situation

- SWOT (Strengths, Weaknesses, Opportunities, and Threats)
- SCOPE (Situation, Core Competencies, Obstacles, Prospects, and Expectations)
- Identify your stakeholders (internal and external)
- Identify information you are missing to make full decisions



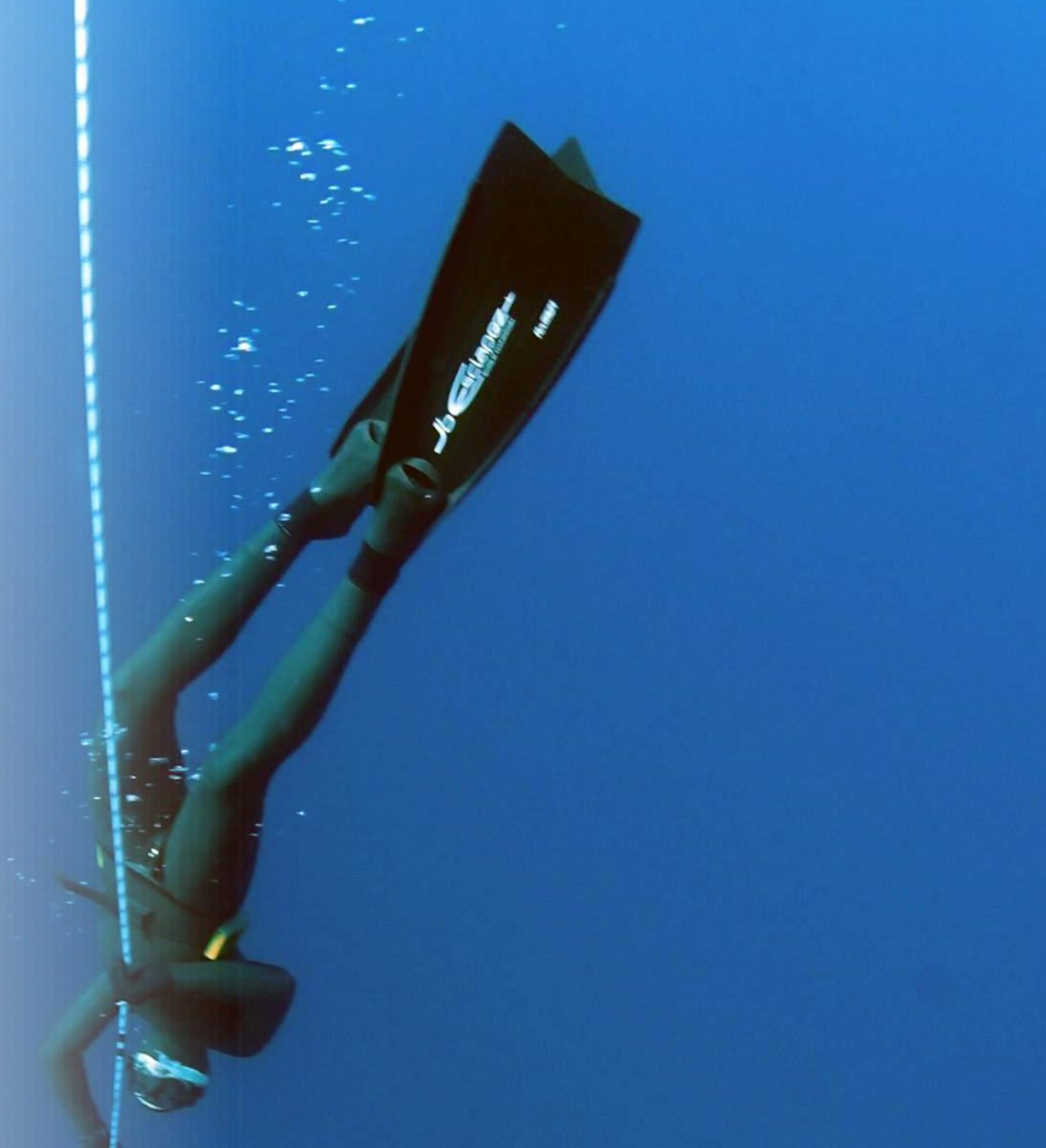
# Develop an Outreach Plan



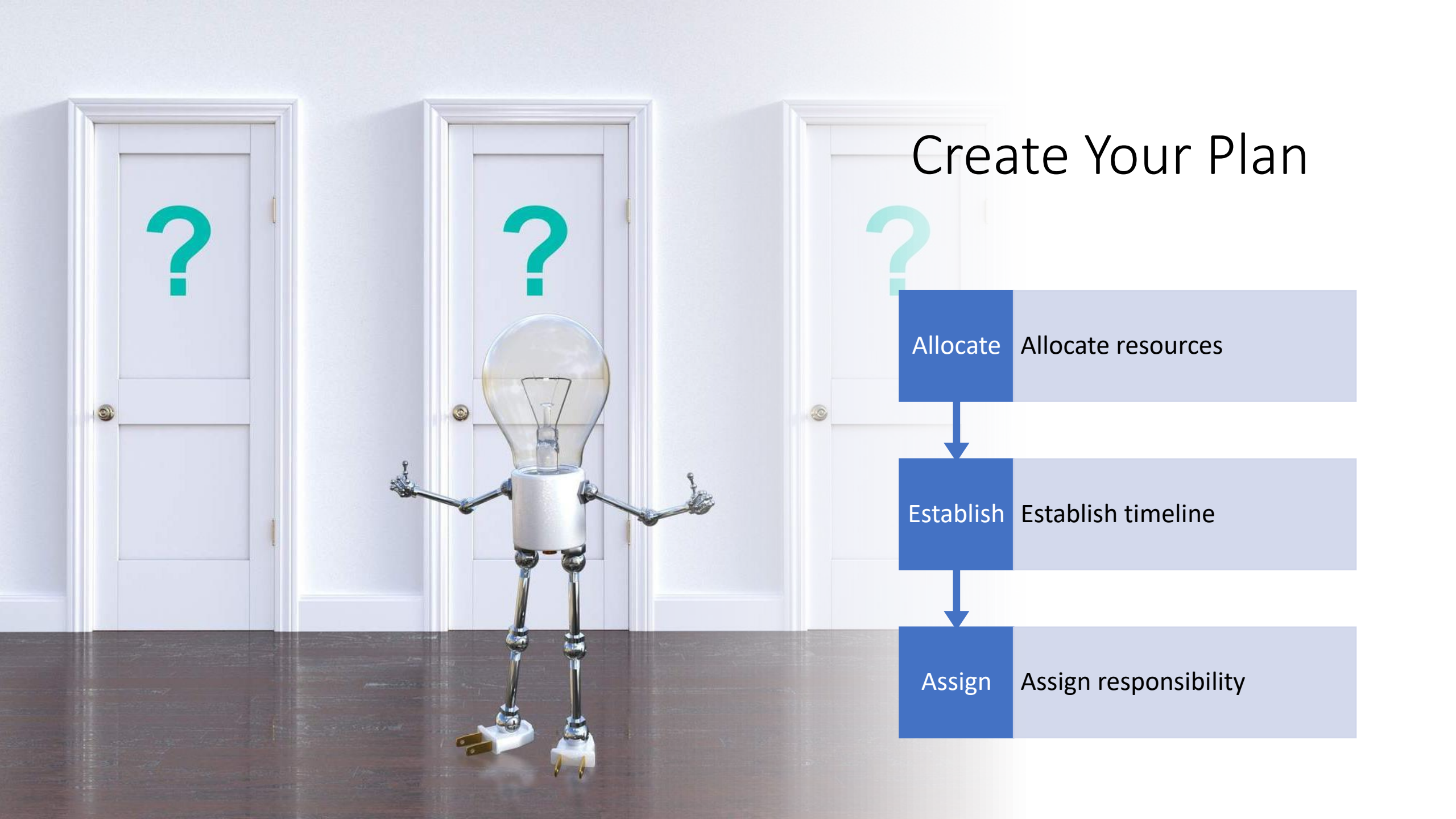
- Identify the stakeholders to reach out to
- Develop a plan to reach out to each group
  - Surveys
  - Focus Groups
  - Interviews
- Writing good questions

# Deep Dive

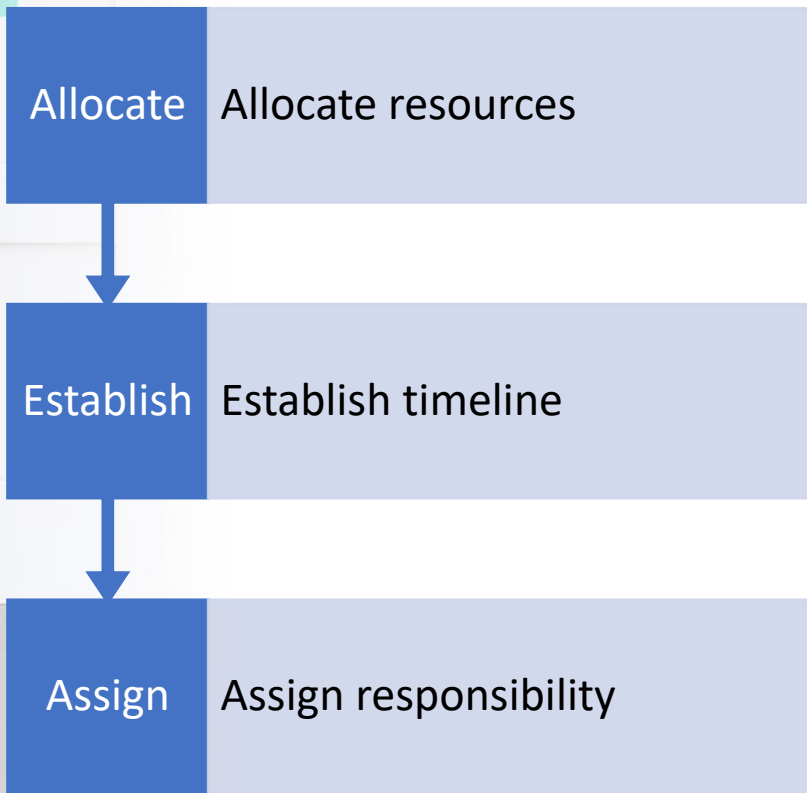
- Leadership
- Operations
- Finance
- Benefits/Programs
- Environmental Scan







# Create Your Plan





## Implementation

- Leveraging your strategic plan in your annual planning/budgeting process
- Goals based reports
- Training/orienting volunteers using the annual plan
  - Procedure on how to adjust
- Tracking progress - adjusting as you go



Questions