Strategic Planning Session
On our way to the future!

SAM ALBRECHT
21 MAY, 2016
Introductions

• About Sam Albrecht, CAE
Approach

• Why strategic planning?
• Survey data
• Alignment
• What a strategic plan is not
• About strategic planning
• How to get a strategic plan
A US Air Force saying: All thrust and no vector!
Why Strategic Planning is Important

• Another way to say it
• “If you don't know where you are going, any road will get you there.”
  • The Cheshire Cat in Alice in Wonderland
• Goal setting not only shows you the road, but gives you a map to get there.
Why Strategic Planning is Important

• “A goal without a plan is just a wish.”
  Antoine de Saint-Exupéry
Why Strategic Planning is Important

• Having a plan focuses staff and leadership
• We can very easily default into day to day operational issues and lose sight of the big picture.
  • BECAUSE IT IS EASIER TO DO!
• Every successful person I know, every great leader I know, has more on his plate than he can get done.
  • Strategy is worth the effort
Q2: Does your center have a strategic plan?

Answered: 35    Skipped: 0
Q3: If your center does have a strategic plan, how old is it?

Answered: 20  Skipped: 15
Q4: How would you answer the following statement: I believe my Board is

Answered: 20    Skipped: 15
Q5: How would you answer the following statement: I believe my staff is

Answered: 20  Skipped: 15
Q7: What ratio of time do you spend on "operations" versus "strategy or strategic thinking"? Please pick the option that most closely approximates your answer.

Answered: 35    Skipped: 0
Alignment

- The plan must be in writing
- The goals must be clear
- The goals must be measurable
- It must add value to your organization
- It must put the pieces together
Align Activities and Programs with Strategic Goals

Strategic Goal 1
• [Text]

Strategic Goal 2
• [Text]

Strategic Goal 3
• [Text]
Align Activities and Programs with Strategic Goals

**EXAMPLE**

<table>
<thead>
<tr>
<th>Strategic Goal One</th>
<th>Strategic Goal Two</th>
<th>Strategic Goal 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Societies</td>
<td>Professional Engineering</td>
<td>Legacy</td>
</tr>
<tr>
<td>• Grants</td>
<td>• UEF</td>
<td>• Awards</td>
</tr>
<tr>
<td>• [Text]</td>
<td>• AAES</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• [Text]</td>
<td></td>
</tr>
</tbody>
</table>
Not to do list:
1.
2.
3.
4.
What a Strategic Plan is NOT

• The answer to Life, the Universe, and Everything
• A Business Plan
• A static document
  • (Think annual updates)
• A bookend
Culture eats strategy for breakfast!
The Planning Process

Where Are We Now?
“Situation Analysis”

- Company Summary
- Strengths & Weaknesses
- Opportunities & Threats
- Competitive Environment
- My Competitive Advantages

Where Are We Going?
“Mission, Vision, Goals & Objectives”

- Mission & Vision
- Goals & Objectives

How Are We Going To Get There?
“Strategies & Action Plans”

- Creative Direction
- Marketing & Sales
- Finance & Accounting
- Production & Operations
- Facilities & Studio
- Management & Organization

How Will We Know We Have Arrived?

- Track Progress
- Measure Programs & Initiatives
- Monitor Financial Results

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Strengths, Weaknesses, Opportunities, Threats
SWOT Template

HELPFUL (for your objective)

Strengths
- __
- __
- __
- __

HARMFUL (for your objective)

Weaknesses
- __
- __
- __
- __

INTERNAL (within organisation)

Opportunities
- __
- __
- __
- __

EXTERNAL (outside organisation)

Threats
- __
- __
- __
- __
Strategic Plan Pyramid

- Vision
- Mission
- Goals
- Objectives
- Tactics
- Action Plans
Vision/Mission

What is a Vision?
- Outlines what the organization wants to be, or how it wants the world in which it operates to be (an "idealized" view of the world). It is a long-term view and concentrates on the future. It can be emotive and is a source of inspiration. For example, a charity working with the poor might have a vision statement which reads "A World without Poverty."

What is a Mission?
- Defines the fundamental purpose of an organization or an enterprise, succinctly describing why it exists and what it does to achieve its vision.
Sample Vision Statements

**Make-A-Wish**: Our vision is that people everywhere will share the power of a wish

**San Diego Zoo**: To become a world leader at connecting people to wildlife and conservation.

**The Nature Conservancy**: Our vision is to leave a sustainable world for future generations.

**Ducks Unlimited**: Our vision is wetlands sufficient to fill the skies with waterfowl today, tomorrow and forever.

**Amazon**: Our vision is to be earth's most customer centric company; to build a place where people can come to find and discover anything they might want to buy online.
Sample Mission Statements

**Audubon:** To conserve and restore natural ecosystems, focusing on birds, other wildlife, and their habitats for the benefit of humanity and the earth’s biological diversity.

**Boy Scouts of America:** To prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law.

**Ducks Unlimited** conserves, restores, and manages wetlands and associated habitats for North America’s waterfowl. These habitats also benefit other wildlife and people.

**San Diego Zoo** is a conservation, education, and recreation organization dedicated to the reproduction, protection, and exhibition of animals, plants, and their habitats.

**Make-A-Wish:** We grant the wishes of children with life-threatening medical conditions to enrich the human experience with hope, strength and joy.

**AARP:** To enhance quality of life for all as we age. We lead positive social change and deliver value to members through information, advocacy and service.
Your Goal
NEXT EXIT
### Less is More

<table>
<thead>
<tr>
<th>Some things to all people</th>
<th>All things to all people</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some things to some people</td>
<td>All things to some people</td>
</tr>
</tbody>
</table>

- **Typical**
- **Only reasonable**
SMART Goals

S = Specific
M = Measurable
A = Achievable
R = Relevant
T = Time-Bound
Objectives/Goals

What do we want?  How do we get there?
What doesn’t fit in the strategic plan?
What’s Next?

• Who Owns “The Plan”?
• Hold yourselves accountable.
• Hold your staff accountable.
• Measure your success!
Big Challenge

• Goals to be formally approved by the Board
• Put the goals at the top of your Board agenda
How to get a strategic plan

• Strategic plans are like a box of chocolates

• Put together an RFP that states what you want in a strategic plan:
  • Cost
  • Final Report
  • Stakeholder input: Board, Staff, Volunteers, Participants
  • Vision/Mission/Goals/Objectives/Tactical Plans
  • Check references, ask for samples of surveys, activities, timeline, agendas, final report
  • Invest time. The better the facilitator understands your organization, the better!
Why hire a strategic facilitator?

• Experience
• Cat Herder
• Outside expert
• Non-biased
• Has the time
Resources

1. www.councilofnonprofits.org/tools-resources/strategic-planning-nonprofits
2. Strategic Planning Kit For Dummies
3. www.idealist.org/info/Nonprofits/Mgmt2
"Slim" Moorehouse driving 36 horses drawing 10 wagon loads of Marquis wheat en route from Gleichen to Calgary Stampede July 1925
Thank You!
Questions?