Strategic Planning Session
On our way to the future!

SAM ALBRECHT
4 JUNE, 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

[Bar chart showing the distribution of responses to the statement]
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
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

- **Internal**: Strengths, Weaknesses
- **External**: Opportunities, 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.
Vision & Mission
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.
<table>
<thead>
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<th>Some things to all people</th>
<th>All things to all people</th>
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Less is More
SMART Goals

S = Specific
M = Measurable
A = Achievable
R = Relevant
T = Time-Bound
Strategic Management Framework

**Purpose & Values**

**Formulation**
- Analysis
  - Remote External Environment
  - Industry Environment
  - Internal Assessment
- Strategy Formation
  - Diagnosis
    - Opportunities
    - Risk assessment
    - Scenarios
  - Strategic Decisions
    - Competitive advantage
    - Generic strategy
    - Portfolio management
      - Geographic scope
      - Market positioning
    - Value Chain
      - Core Competence
- Goal Setting
  - Guiding Policies
  - Objectives
    - Corporate
    - Business
    - Functional
- Structure
  - Organizational Structure & Leadership
  - Initiatives, programs & investments
  - Measures & Scorecards
  - Mergers, Acquisitions & Divestitures

**Implementation**
- Control & Feedback
  - Budgets & Financial Plans
  - Incentives
  - Review & Evaluation
### Objectives/Goals

<table>
<thead>
<tr>
<th>What do we want?</th>
<th>How do we get there?</th>
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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

2. Strategic Planning Kit For Dummies
3. [www.idealist.org/info/Nonprofits/Mgmt2](www.idealist.org/info/Nonprofits/Mgmt2)
Slim Moorehouse driving 36 horses drawing 10 wagon loads of Marquis wheat on route from Gleichen to Calgary Stampede July 1925.
Thank You!
Questions?