



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

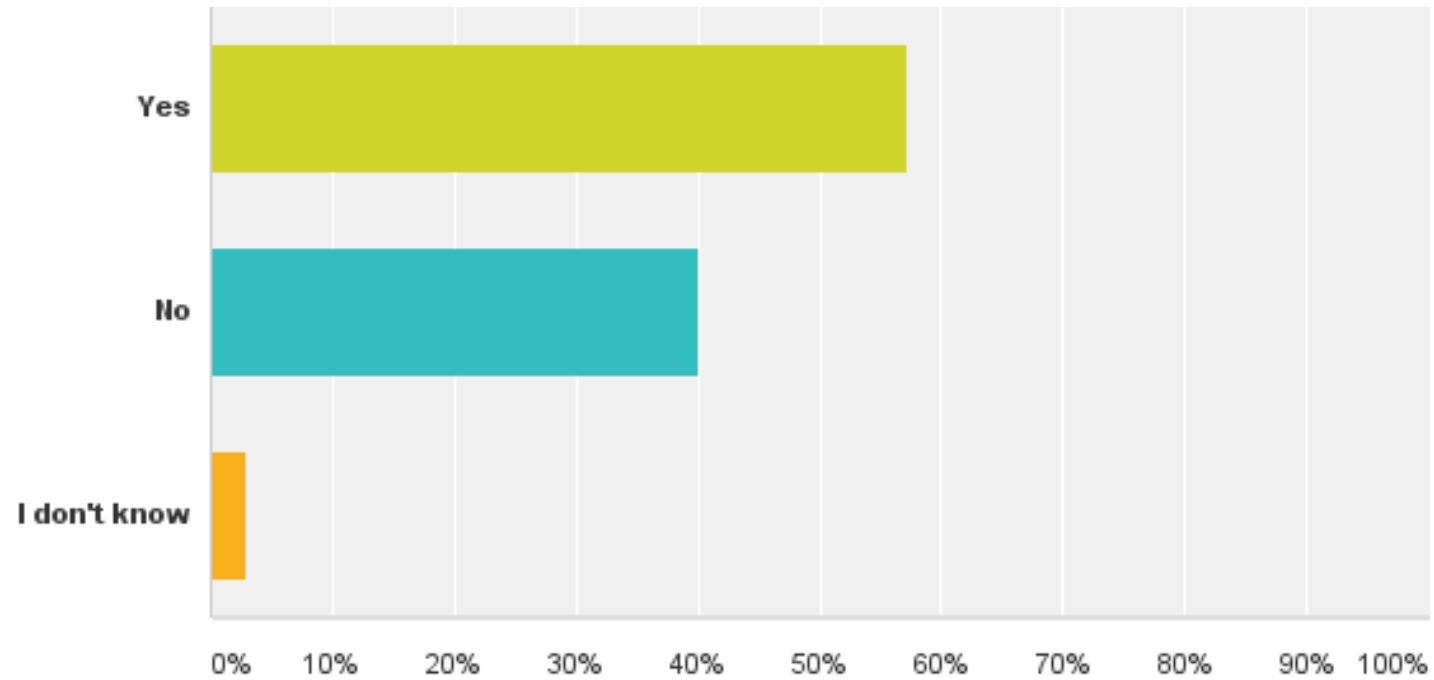
- Having a plan focuses staff and leadership
- We can very easily default into day to day operational issues and lose sight of the big picture.
 - BECAUSE IT IS EASIER TO DO!
- Every successful person I know, every great leader I know, has more on his plate than he can get done.
 - Strategy is worth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

Strategic & Business Planning - Region 5

Wednesday, July 22, 2015

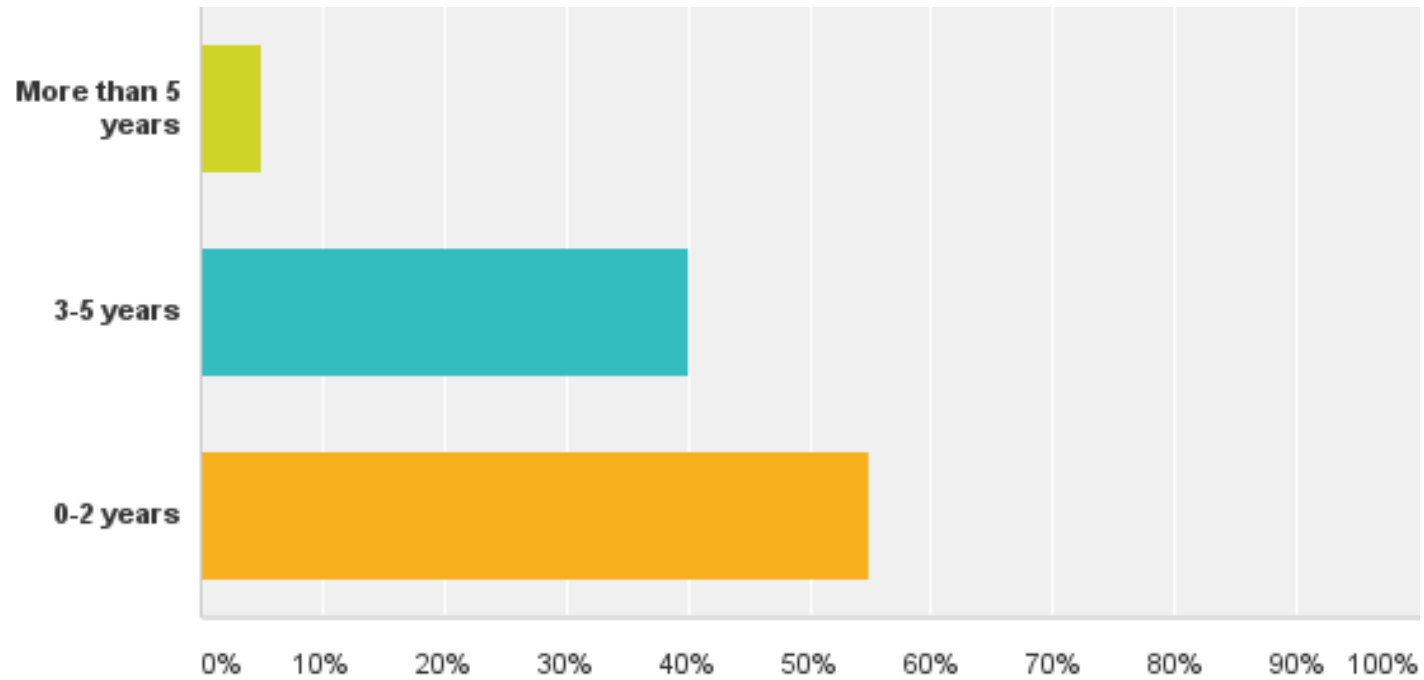
Q2: Does your center have a strategic plan?

Answered: 35 Skipped: 0



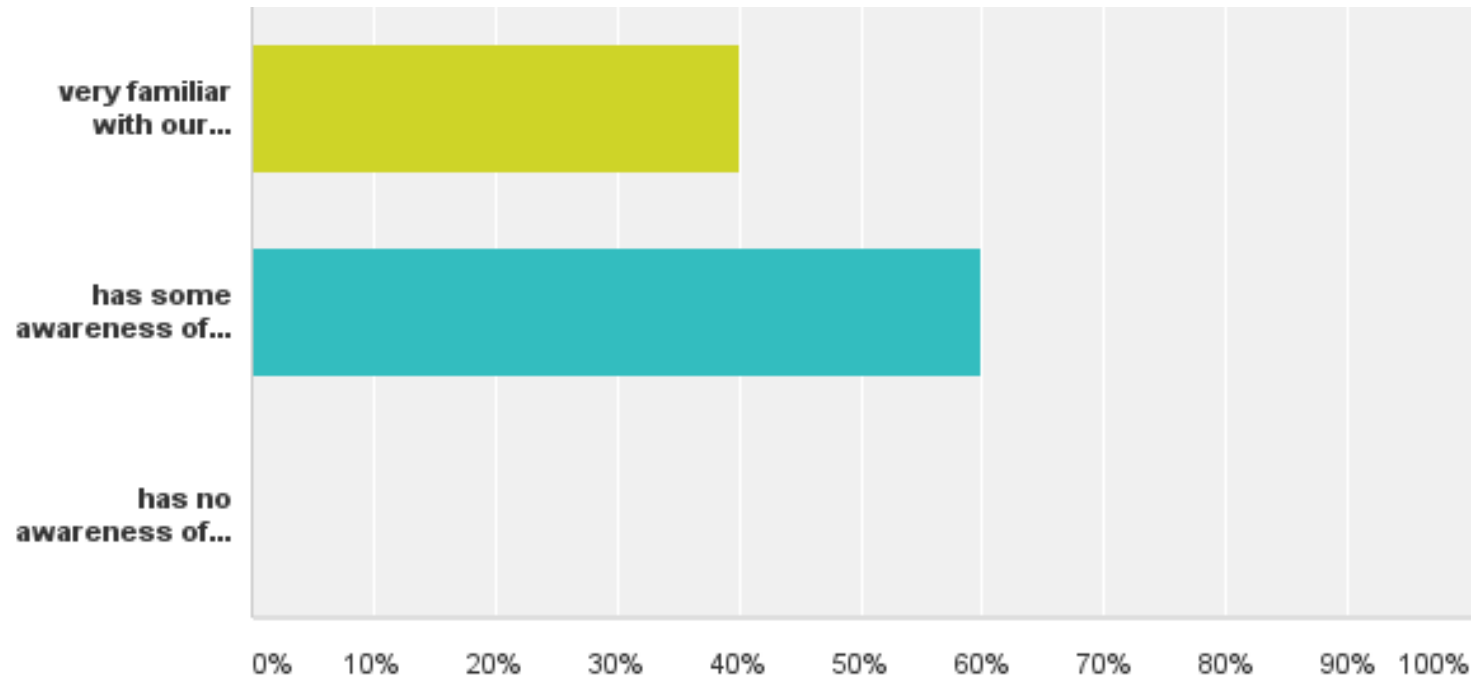
Q3: If your center does have a strategic plan, how old is it?

Answered: 20 Skipped: 15



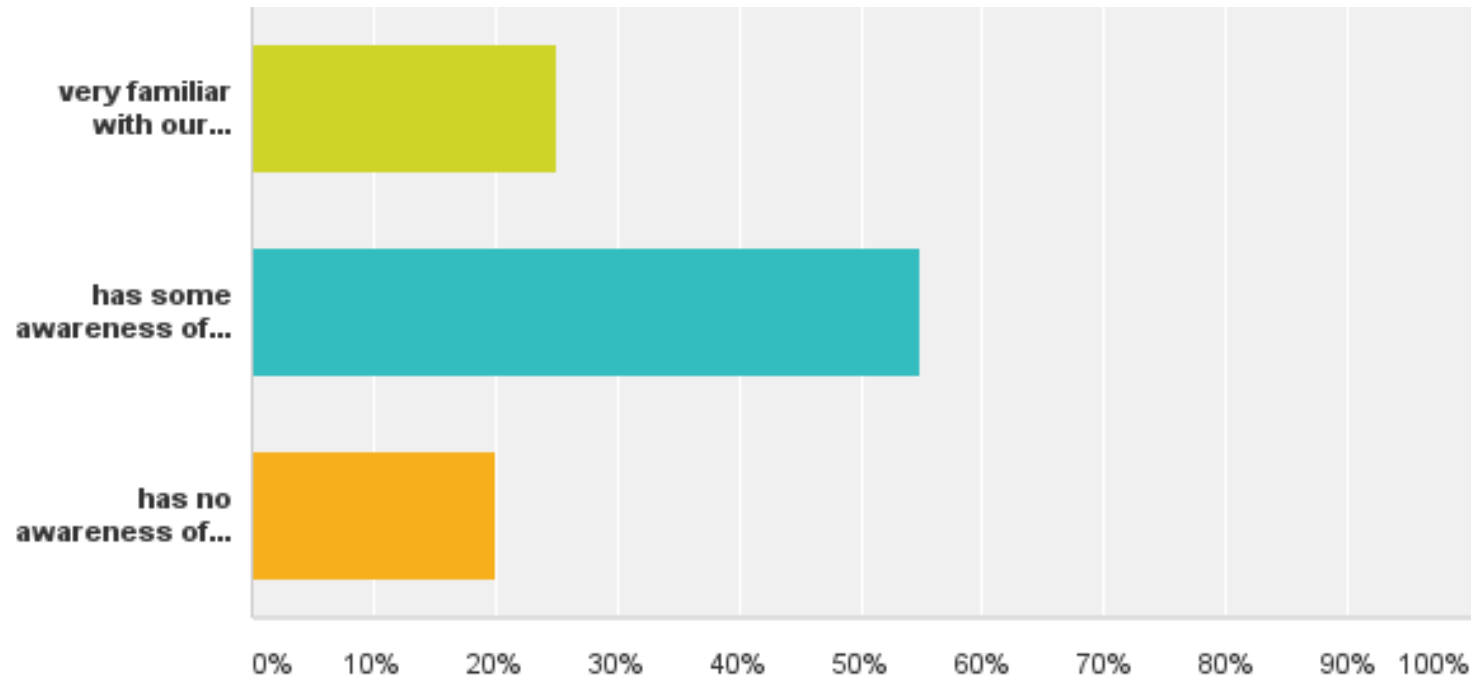
Q4: How would you answer the following statement: I believe my Board is

Answered: 20 Skipped: 15



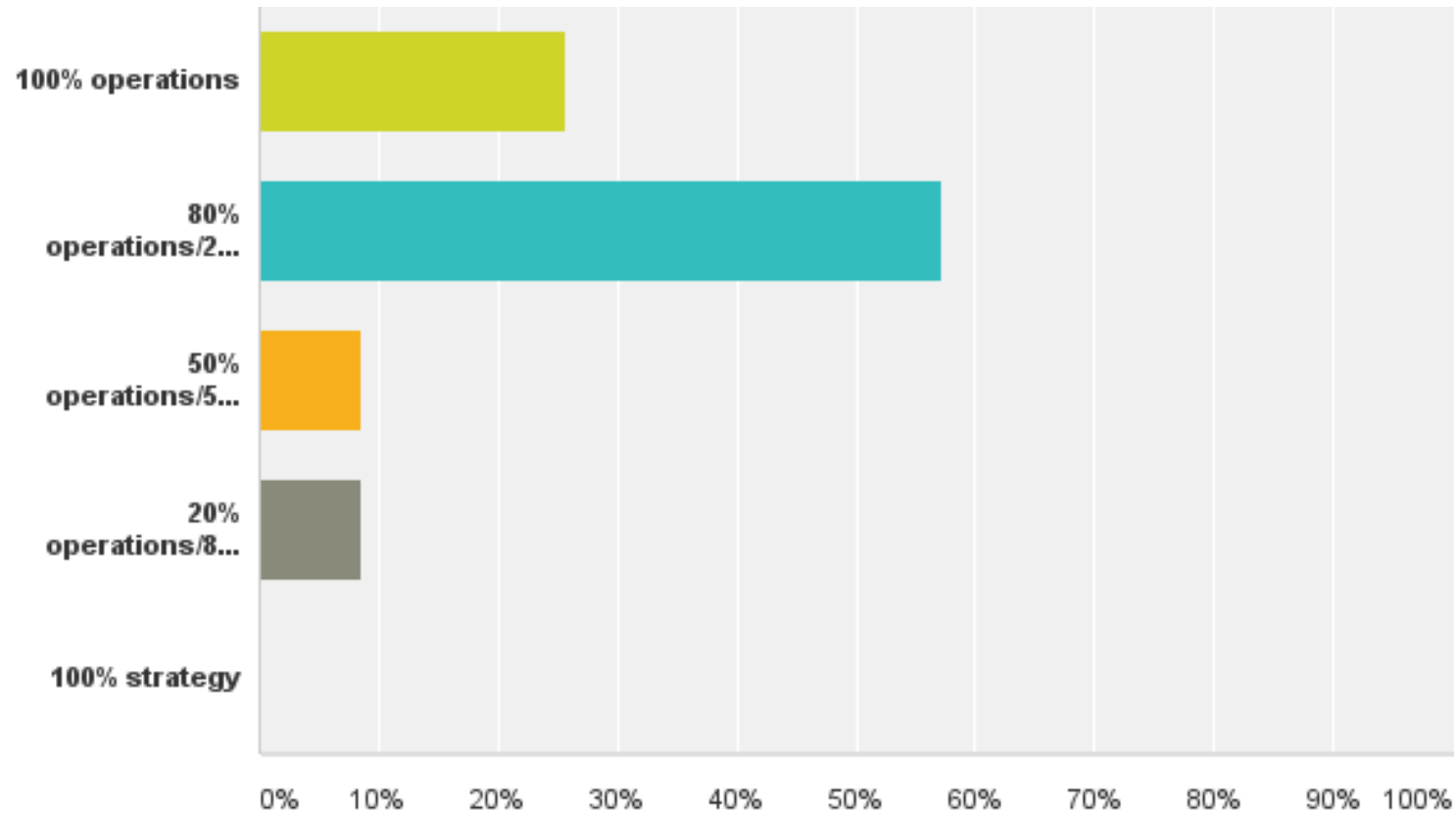
Q5: How would you answer the following statement: I believe my staff is

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

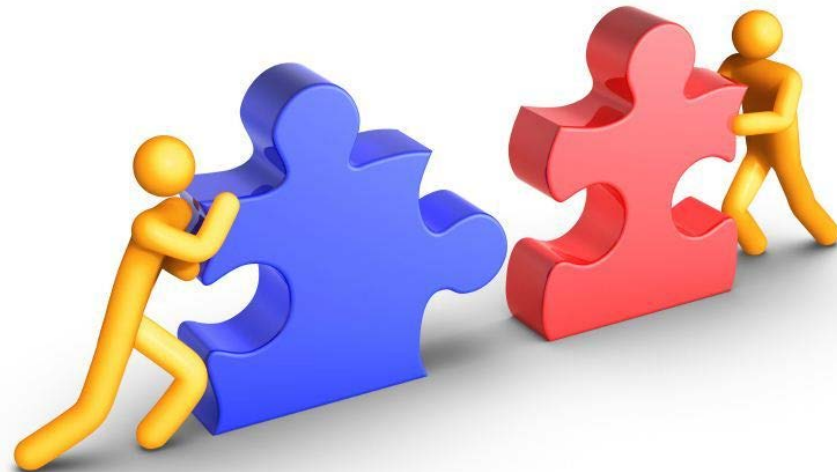


Alignment

- 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



key



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

Strategic Goal One Member Societies

- Grants
- [Text]

Strategic Goal Two Professional Engineering

- UEF
- AAES
- [Text]

Strategic Goal 3 Legacy

- Awards



Not to do list:

1.

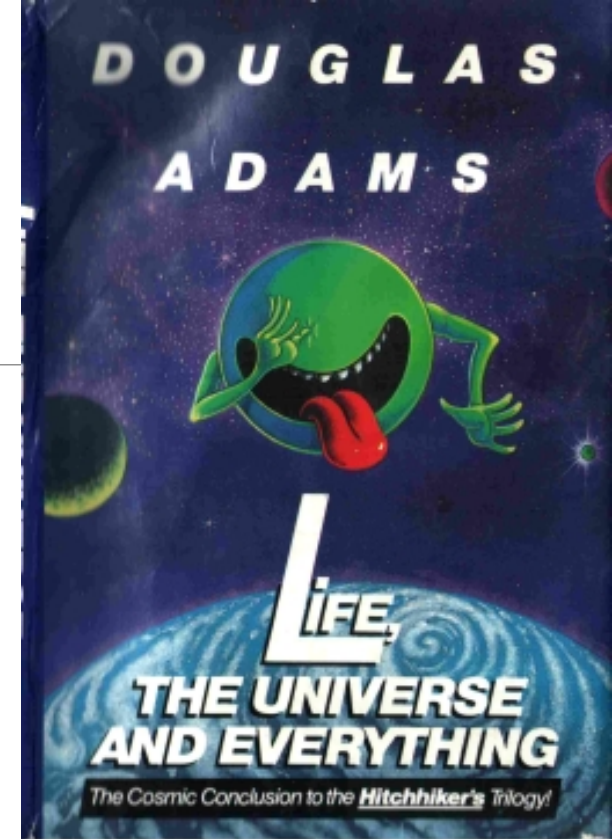
2.

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



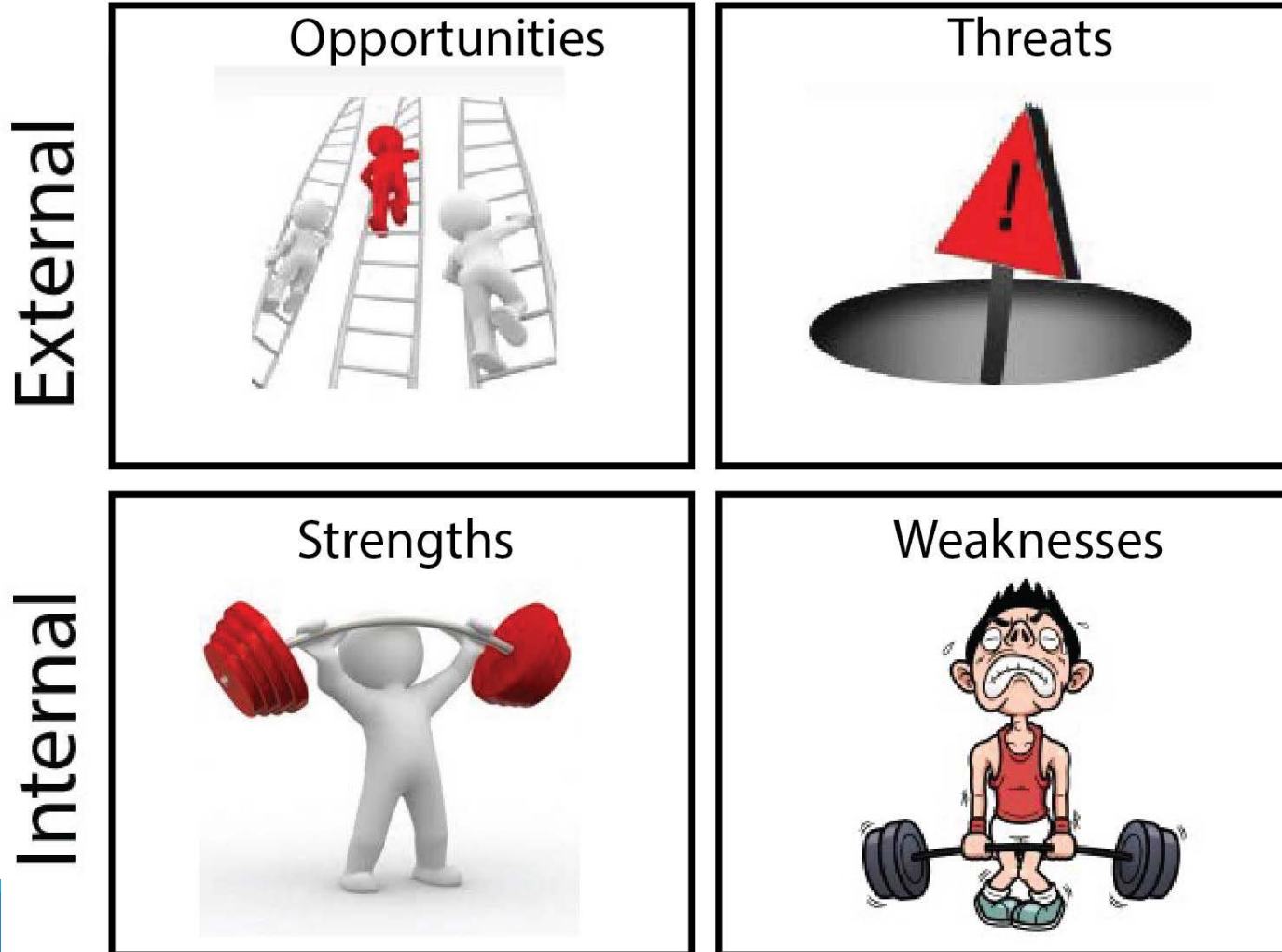


Culture eats
strategy for
breakfast!

The Planning Process



Strengths, Weaknesses, Opportunities, Threats



SWOT Template

	HELPFUL (for your objective)	HARMFUL (for your objective)
INTERNAL (within organisation)	Strengths <ul style="list-style-type: none">• • • • • S	Weaknesses <ul style="list-style-type: none">• • • • • W
EXTERNAL (outside organisation)	Opportunities <ul style="list-style-type: none">• • • • • O	Threats <ul style="list-style-type: none">• • • • • T

Strategic Plan Pyramid



Vision/Mission

What is a Vision?

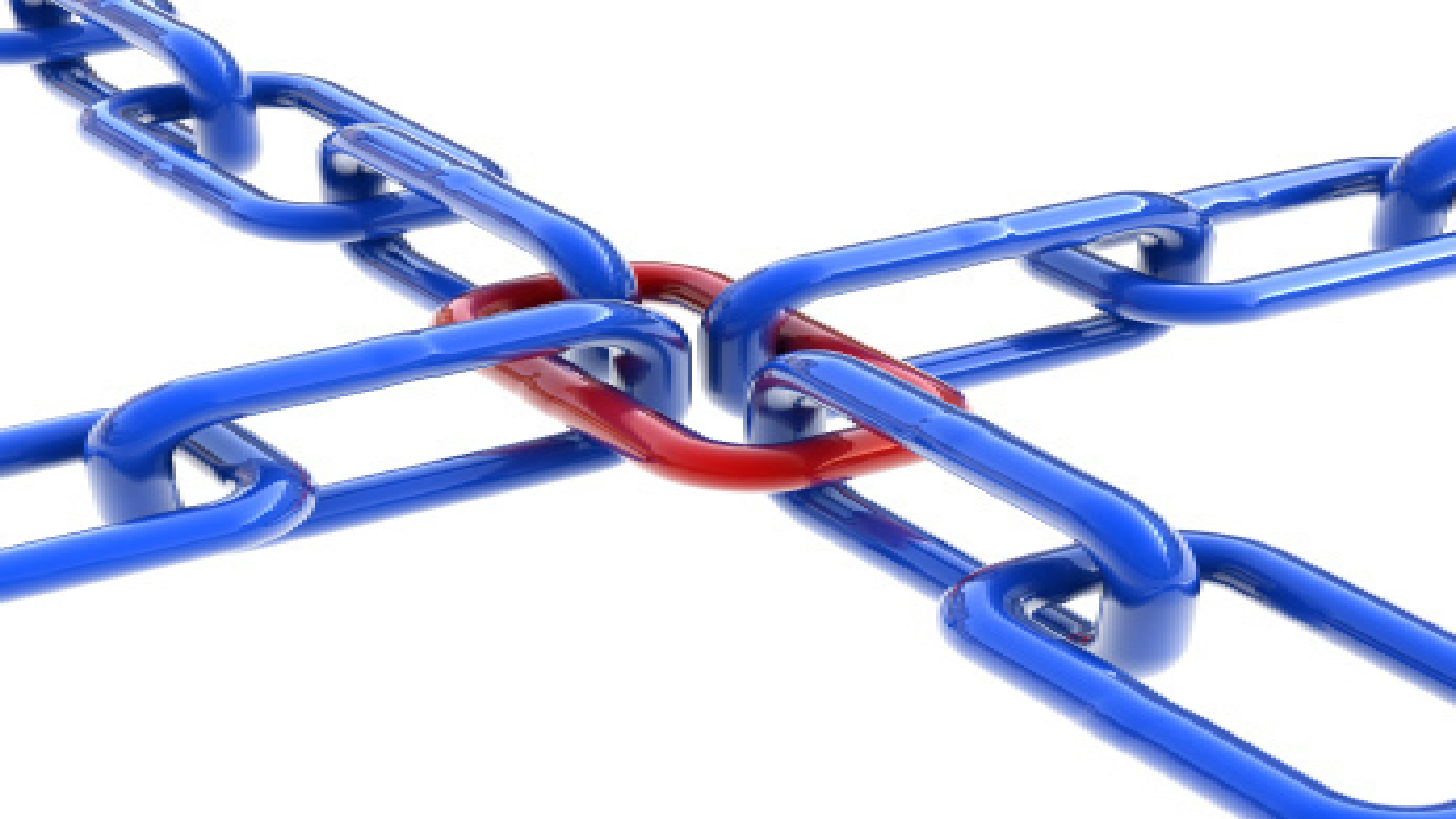
- Outlines what the organization wants to be, or how it wants the world in which it operates to be (an "idealized" view of the world). It is a long-term view and concentrates on the future. It can be emotive and is a source of inspiration. For example, a charity working with the poor might have a vision 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.

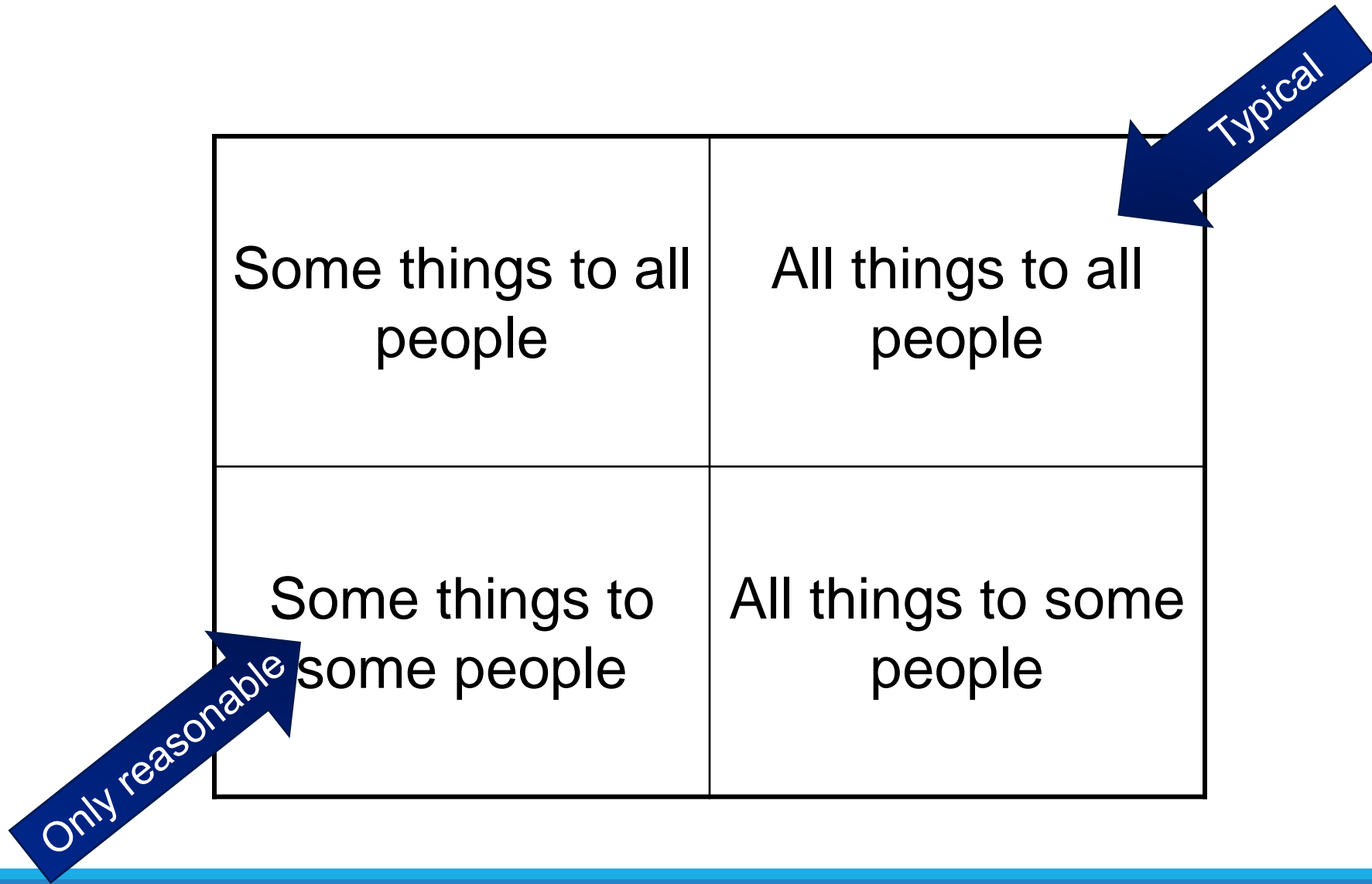
San Diego Zoo is a conservation, education, and recreation organization dedicated to the reproduction, protection, and exhibition of animals, plants, and their habitats.

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.



Less is More



SMART Goals

S = Specific

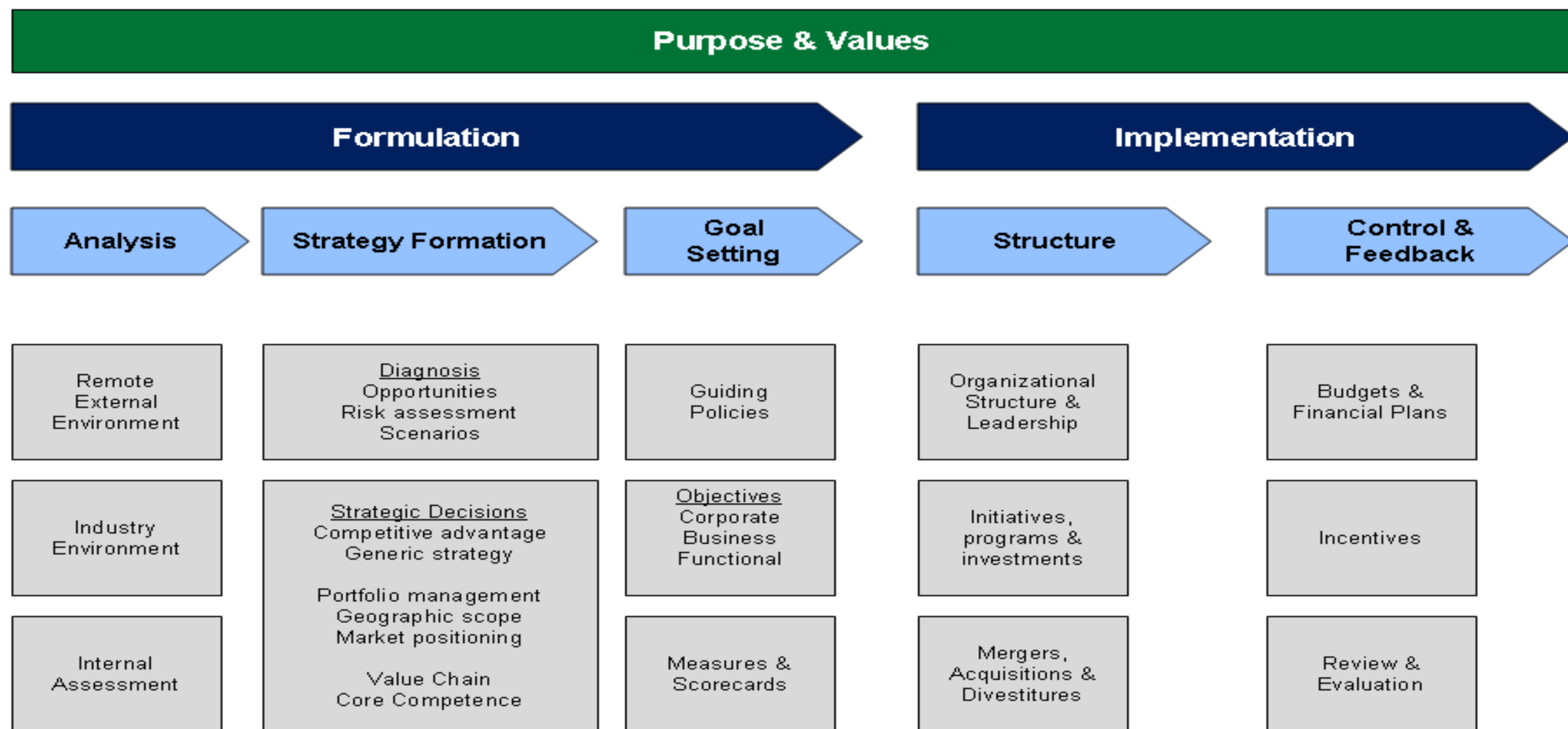
M = Measurable

A = Achievable

R = Relevant

T = Time-Bound

Strategic Management Framework



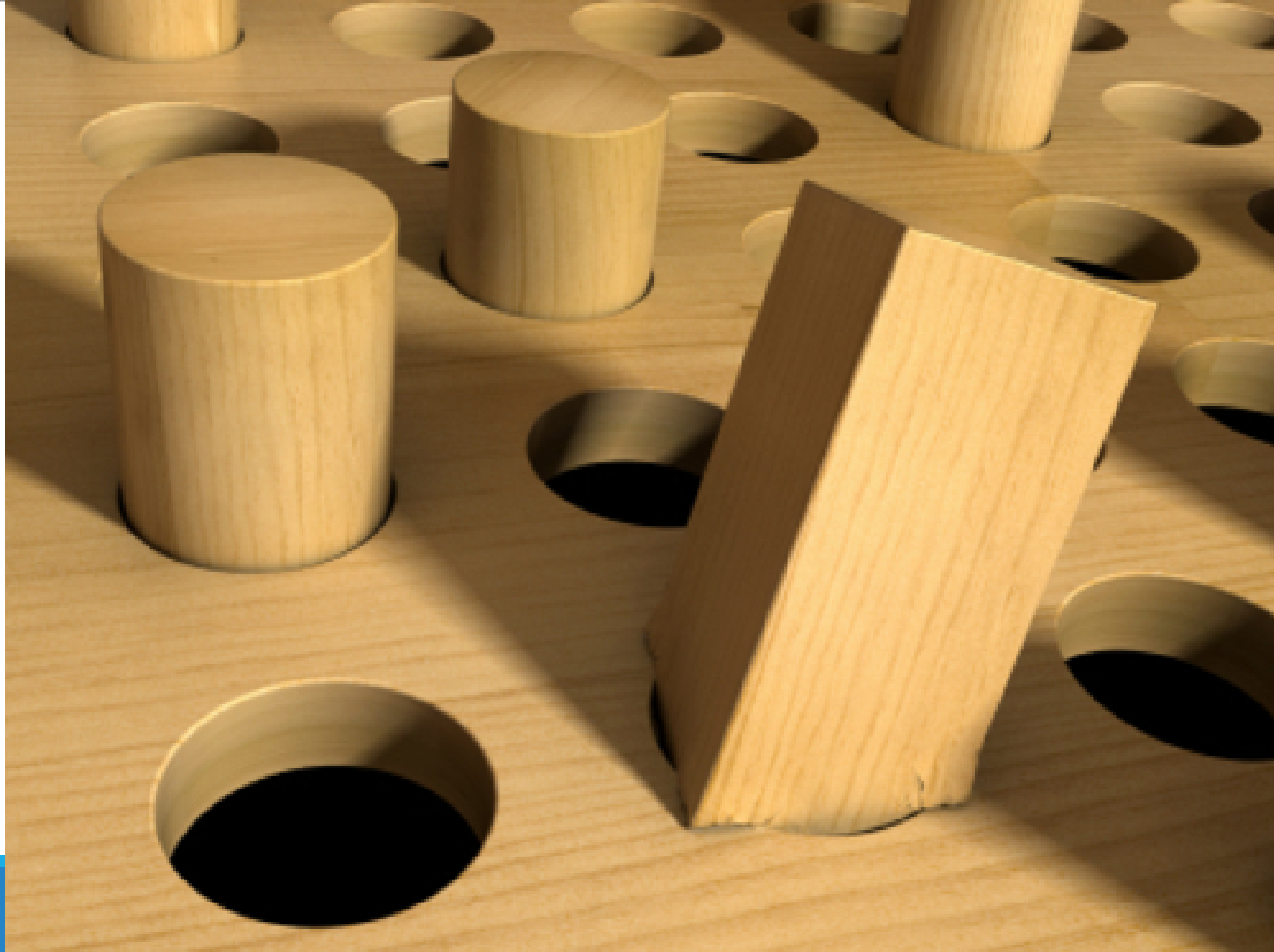
Objectives/Goals

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!

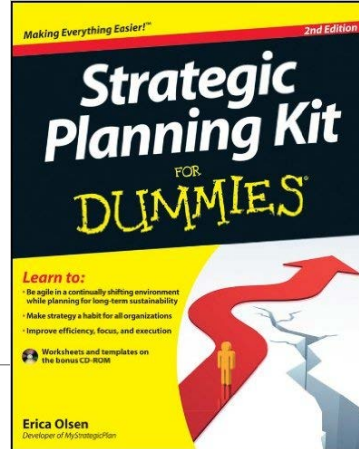
Why hire a strategic facilitator?

- 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.idealists.org/info/Nonprofits/Mgmt2
4. <http://philanthropynewsdigest.org/columns/the-sustainable-nonprofit/strategic-planning-five-steps-to-a-more-secure-future>
5. <http://npengage.com/nonprofit-management/8-strategy-basics-for-nonprofit-organizations/>





'Slim' Moorehouse driving 36 horses drawing 10 Wagon loads of Marquis wheat en route from Gleichen to Calgary Stampede July 1925

Thank You!

Questions?
