

STRATEGIC PLANNING

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THE MOST ENDURING ORGANIZATIONS

- Compelling vision of what is possible.
- Sensitive and adaptive to a changing world.
- Work environment that gives people a sense of community and belonging.
- Driving commitment to new ideas, learning, and innovation.
- Strengthen the capacity of people to make decisions, solve problems, and initiate change.
- Reward innovation, risk taking, and quality betting tips.
- Conserve financial and other resources.

STRATEGIC PLANNING: WHAT IT IS AND WHY IT MATTERS

Intentional and disciplined effort to make decisions and take actions that shape and guide what an organization is, what it does, and why it does it.

- Value that our organization brings
- Operationalizes high level concepts (mission, vision, values)
- Directs/allocates our resources to achieve value
- Usually results in 4-5 key areas of focus (strategic objectives) that cascade throughout the organization

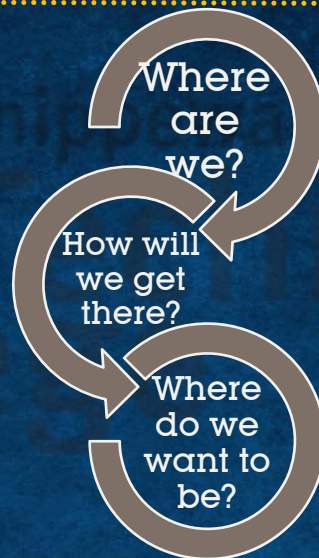
STRATEGIC PLANNING: WHAT IT IS NOT

- A panacea
- Synonymous with action: it's a plan of intention; to be realized action must be taken

STRATEGIC PLANNING: KEY ELEMENTS

- Organizational values (guide behaviors)
- Vision (how we will look in the future)
- Mission (our “why”, our purpose)
- Strategy (focus to realize our vision while delivering on mission and values)
- Strategic objectives
- Roles, responsibilities, accountabilities

STRATEGIC PLANNING: A SIMPLE MODEL



STRATEGIC PLANNING: AN APPROACH

- Initiate and agree on a process
- Identify mandates
- Clarify values and mission
- Assess strengths, weaknesses, opportunities, threats
- Identify key issues
- Formulate objectives to address key issues
- Review, adopt, execute, and monitor the plan

STRATEGIC PLANNING: INITIATE AND AGREE ON A PROCESS

- Purpose
- Steps
- Roles and responsibilities. Who should be involved and why?
- Resources needed
- Constraints

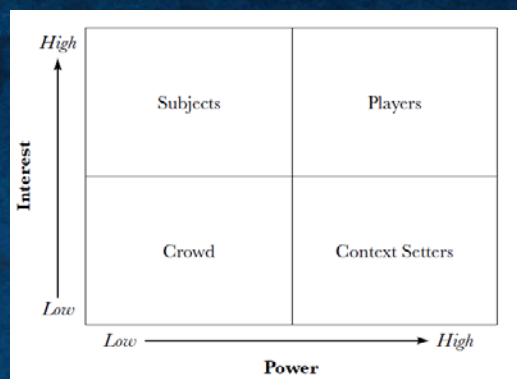
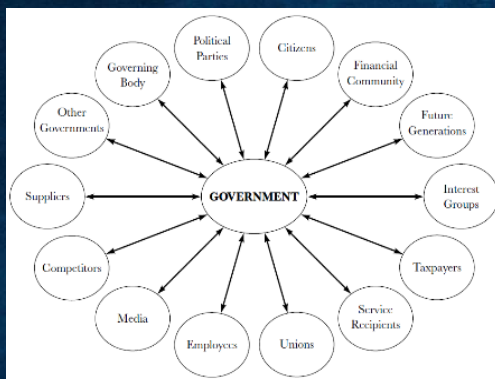
STRATEGIC PLANNING: INITIATE AND AGREE ON A PROCESS

ROLES AND RESPONSIBILITIES

- **Steering group/committee** → Determined by board chair and director
- **Facilitator** → Determined by board chair and director
- **Agreement on design and process** → determined by board chair and executive director or steering group and facilitator
- **Gather information/distribute as needed** → Steering group, staff and facilitator
- **Strategic planning session** → Stakeholders, facilitator
- **Draft plan** → Steering group
- **Approve plan** → Board
- **Implement** → Those indicated
- **Monitor** → Steering group

STRATEGIC PLANNING: INITIATE AND AGREE ON A PROCESS

STAKEHOLDERS



Participation: inform, consult, involve, empower? And who to involve in which issues?

STRATEGIC PLANNING: MANDATES

- What “musts” does the organization confront?

STRATEGIC PLANNING: MISSION AND VALUES

- Who are we?
- What is the value we bring?
- What needs do we meet?
- What makes us distinct or unique?
- What core beliefs guide us?

STRATEGIC PLANNING: SWOT

- What are our **Strengths** and **Weaknesses** (internal)?
- What are our **Opportunities** and **threats** (external)?

STRATEGIC PLANNING: SWOT



- External: Forces or trends (political, economic, social, technological, environmental, and legal), key resource controllers, actual competitors or collaborators
- Internal: Resources (inputs), processes, and performance (outputs)

STRATEGIC PLANNING: IDENTIFY KEY ISSUES

- What are the issues?
- What factors make these issues?
- What needs to be done?
- How or how much?
- Why?
- Where?
- When?
- Who?

STRATEGIC PLANNING: FORMULATE STRATEGIC OBJECTIVES

- What are the practical alternatives?
- What are the barriers?
- What are the proposals to achieve the alternatives?
- What major actions must be taken?
- What are the next steps?