

Strategic Planning

Making This Best Practice, Your Practice

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Not Ready to Plan

- Leaders have already decided direction
- Current problems claim all staff and board time and energy
- Leaders are reluctant to involve others
- Environment is not conducive to creativity or strategic thinking

A Good Planning Environment

- Leaders are committed
- Planning roles and expectations are clear
- Resources are sufficient
- Board and staff understand the planning process
- There is consensus about the desired outcome
- There is willingness to question the status quo
- No serious conflicts exist

Hard Objectives

- **Increase ability to fulfill mission and achieve goals**
- **Identify and prioritize key strategies**
- **Identify and clarify roles for all**
- **Enhance recruitment/retention of volunteers, board, donors**
- **Align resources for maximum impact**
- **Provide basis for evaluating effectiveness**

Soft Benefits

- **Builds consensus**
- **Facilitates effective management**
- **Enables a proactive approach**
- **Enables preventive or corrective action before problems grow into crises**

More Soft Benefits

- **Helps assure realistic goals and objectives**
- **Provides the basis of a control system**
- **Assures everyone is results-oriented**
- **Enhances accountability**
- **Enhances professionalism**

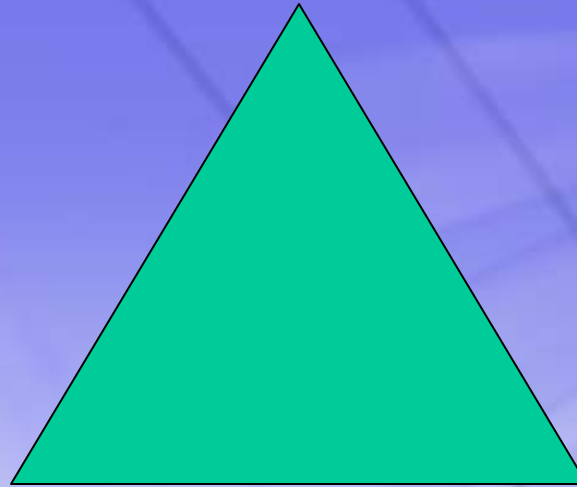
Before you start!

The Internal Plan-to-Plan Meeting

- Define your purpose
- Define your outcome
- Define who will be involved
- Build consensus
- Identify the planning committee

Phase I - The Planning Committee

Org Leadership



Expertise

Community
Participation

Phase I - The Planning Committee

Reverse engineering

Recruit for your outcome

- ◆ Organizational alignment (Admin, Program, Volunteer...)
- ◆ Community buy-in (Govt., Business..)
- ◆ Technical solutions (Legal, Marketing...)
- ◆ Consider a diverse view for creativity

Phase II

- **Re-visit mission and vision**
- **Agree on planning goals and objectives**
- **Identify critical issues to test**
- **Set timetable and make assignments**
- **Gather information**

Methods for Gathering Info

- Internal records, statistics, reports and budgets
- External statistics and trends
- Literature review
- Market studies of other orgs like you
- Interviews
- Surveys
- Focus groups
- Speakers

Program Assessment

- Requirements
- Implementation
- Outcomes
- Impact

Phase III – Strategy Development

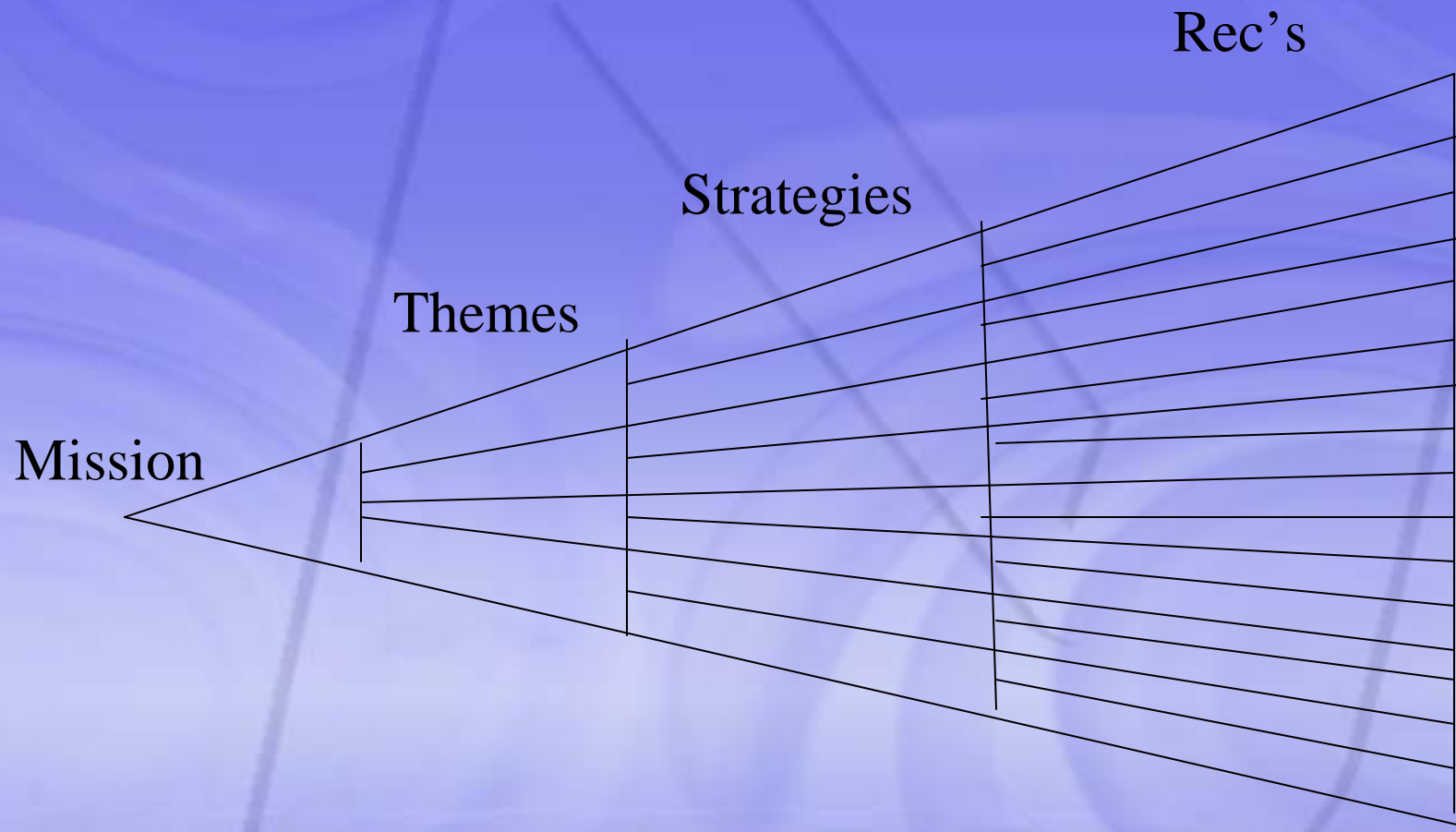
- **Sort data – toss what doesn't apply to the issues you're testing**
- **Analyze – move from raw data to the story**
- **Organize into themes**
- **Turn into presentation**

Phase III – Strategy Development

The Planning Retreat

- Review presentation of data and themes
- Group themes
- Consider possible strategic approaches to each theme
- **Prioritize strategies and make recommendations**
 - ◆ Align strengths and weaknesses with opportunities and threats
 - Decide how to capitalize on strengths
 - Decide how to overcome weaknesses
- **Get buy-in from those responsible to implement**

Phase IV - Workplan Development



Phase IV - Workplan Development

Identify Workplan Team to operationalize strategies and recommendations

- Break into short-term (1 year) and long-term (3 years or more) actions
- Re-visit board, committee and job descriptions
- Develop measurements and milestones
- Develop budgets
- Draft a written plan

Phase V – Gaining Agreement

- **Present plan to Planning Committee**
- **Present plan to full Board of Directors**
- **Adopt plan through vote of the board**
- **Present Plan to Staff**
- **Assign objectives and tasks for implementation**

Course Corrections

- **Monitor** (Keep a copy in front of you)
- **Evaluate** (Use it in your planning and performance reviews)
- **Revise** (Keep it current)

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