



What is strategic planning?

Strategic planning is a simple, rational method for building a consensus for participation, commitment, urgency and action. It is a framework for organizational decision making. It is a blueprint for success.

What does strategic planning do?

Strategic planning forces examination of all preconceived ideas and established procedures. “Does this action/policy/procedure advance our purpose?” Strategic planning creates a standard for measuring performance. And strategic planning unifies the decisions of a chapter’s board and its committees.

What isn’t strategic planning?

Strategic planning is not a tool for control by a powerful or forceful minority. Strategic planning does not replace day-to-day operational decision making. It is not static, written in stone.

Additional bonuses from strategic planning...

Participation in strategic planning creates a sense of participation among chapter members and provides buy-in from members and continued loyalty. Participation in strategic planning encourages the development of new leaders within the organization.

Strategic Planning Development Stages:

1) Identify Your Mission Statement:

The mission statement is the public statement of purpose, why are we here? The statement should motivate members and officers as well as incorporate a vision of future. Mission statements can be a great public relations piece, but it should not be written as one. The statement has to come from the heart of the organization.

How do you form a mission statement?

A mission statement is formed by asking the following questions, what is the chapter’s purpose? Why is this purpose important? What will the chapter do to fulfill this purpose? How will the chapter benefit the community?

Because the mission statement is the organization’s unifying theme, its development must be very carefully managed. A poorly considered or elucidated mission statement will undermine the chapter’s efforts. Members will either pursue the wrong goals or turn away from the entire process, throwing away the good with the bad.

To make a mission statement effective involve all stakeholders; board members, committee chairs, past presidents and anyone else you can think of. Make sure to commit adequate time and resources. Some times the best results are to go off-site to a retreat.

To keep the mission statement creation on track appoint a moderator whose primary responsibility it to keep all participants on task. Because many of the participants will have extensive association history, each will have his or her own perception of problems. This is good, but can also result in focusing on specific problems/solutions rather than on a comprehensive view.

Make sure to have a secretary record all ideas, suggestions and comments. Feel free to tape the session(s) in order to capture this information. The participants may want to refer to these thoughts during and after the mission statement development process. The notes will also provide non-participants with an understanding of how the mission statement was shaped, and will encourage acceptance. Disseminate a complete report,

including any unreconciled issues to all participants. Create a similar report for rank-and-file members. Be sure to invite comment, suggestions, etc. before taking the next step in the process.

2) Create Long-Term Goals

Goals are general statements about what you need to accomplish to meet your purpose, or mission, and address major issues facing the association. Try to plan for three years. Determine what you want the association to accomplish in the three years. Quantify the results as much as possible, instead of grow membership, say grow membership by 20%. Do the same with education, legislation and any other areas the chapter is active in. Determine why these goals are noteworthy. Establish 4-8 goals. Each goal should be measured against the following question: Does achieving this goal reinforce and strengthen our mission? If not, it doesn't belong in the strategic plan. Again, disseminate this information to all participants and to the membership. Encourage active participation and comments.

3) Establish Objectives and Specific Strategies

Outline specific steps that will be needed to achieve the established goals. Map the route and establish a time frame. Assign specific tasks to specific committees and individuals. Create measurement parameters. These strategies are often what change the most as the organization eventually conducts more robust strategic planning, particularly by examining the external and internal environments of the association.

4) Identify Specific Action Plans to Implement each Strategy

These are the specific activities that each major function (i.e. department, etc.) must undertake to ensure it's effectively implementing each strategy. Objectives should be clearly worded to the extent that people can assess if the objectives have been met or not. Ideally, the top management develops specific committees that have a work plan, or set of objectives.

5) Monitor and Update the Plan

Planners regularly reflect on the extent to which the goals are being met and whether action plans are being implemented. Perhaps the most important indicator of success of the organization is positive feedback from the membership.

Communicate!

The only way to pull the mission statement, goals and everything else generated through the strategic planning is by COMMUNICATING the information. Prepare a final report for distribution to all members. Be ready to explain the process, the outcome and the significance of strategic planning and the mission statement. Include the mission statement in all member communications. Newsletters, meeting announcements, handouts at meetings, etc.

Throughout the process, make sure to seek consensus from all interested parties. The mission statement and strategic planning shouldn't be a surprise to anyone. Refer to the mission statement when making important decisions about the association's direction.

Revisit and reconsider the entire strategic plan at least once each year. This is a good exercise for the incoming president and board. This process acquaints them with the mission statement, the direction of the associations and ensures that the goals and objectives are still valid in a changing world.

The objectives can change as needs change. The goals might change as objectives are met or missed. The mission statement should only change if there's a revolution in the industry.