

Basics of “Strategic Plan / Planning”

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Strategic Plan

Presentation Outline

- Define the Strategic Plan
- Why is it used
- Sample Strategic Plan

Strategic Plan

Strategic Planning is an organizational management activity that is used to:

- Set goals
- Set priorities
- Streamline and focus the resources
- Ensure that all are working toward common goals

Strategic Plan

What is included in a Strategic Plan

- Mission
- Vision
- List of **prioritized goals** you want to accomplish
- **How and when** you intend to accomplish these goals

Strategic Plan

Strategic Plan (SP) Steps:

1. Consider hiring (\$) outside agency to lead the SP process
2. The leadership meet and brainstorm on the issues of importance
3. Separate the issues into related-topics
4. Divide the team in to “Working Groups” (each group work separately)
5. Each group rank / prioritize the issues / goals
6. Decide on the number of years to complete the goals
7. Follow up monthly on the progress of implementing the SP
8. At the last year of the SP, decide on the next step: a) take 1 year to assess, b) Initiate a new SP, c) extend the current SP by # of year(s), etc.

Sample Strategic Plan

Strategic Plan

SEAOI 2017 Strategic Plan Summary

Workgroup	Issue	Goal
GOVERNANCE	1 - Define SEAOI's Mission and Vision & Core Values	1.1 - Establish & Publish SEAOI's Mission 1.2 - Define SEAOI's Vision 1.3 - Review SEAOI's Core Values
	2 - Make SEAOI Sustainable	2.1 - Develop Sustainable Finances 2.2 - Make SEAOI Operations Sustainable 2.3 - Ensure adequate protection against risks 2.4 - Increase strategic component of board applicants
	3 - Implementation of Strategic Plan	3.1 - Assign PM for Implementation of Strategic Plan for Upcoming year 3.2 - Re-energize and Rename Long Range Planning Committee into Implementation of the Strategic Planning Committee
	4 - Improve Board Operations	4.1 - Develop Board/Committee Chair Job Descriptions 4.2 - Review and Further Develop Board/Chair Orientation 4.3 - Develop a Plan to Assess Committee Accountability and Progress
	5 - Review non-program Committees, including SEF and SEPAC	5.1 - Prioritize/Combine non-program committees 5.2 - Review partnership with SEPAC and SEF
OUTREACH	1 - Enable SEAOI to achieve its stated mission regarding outreach	1.1 - Define Outreach group and expectations 1.2 - Educate external stakeholders on Structural Engineering 1.3 - Educate legislators so that they can promote legislation conducive to the good practice of engineering 1.4 - Encourage the young to pursue an education in engineering 1.5 - Develop/maintain communication and promote cooperation with appropriate professions and groups in the industry
	2 - Determine and prioritize goals for target audience	2.1 - Define target audience 2.2 - Develop ROI for events/Efforts 2.3 - Prioritize goals for each target audience
MEMBERSHIP	1 - Need additional members to grow organization to achieve our mission.	1.1 - Increase Membership 3% every year for 5 years
	2 - Continue to lose a number of members each year.	2.1 - Decrease attrition from prior year by 3% for 5 years
	3 - SEAOI has members who are not actively involved in our events or committees	3.1 - Increase member engagement by increasing member attendance at events by 5% for 5 years
PROGRAMS	1 - Reinvent current program offerings	1.1 - Evaluate programs
	2 - Internal coordination amongst committees can improve	2.1 - Facilitate better communication and collaboration amongst committees
	3 - Improve online offerings	3.1 - Build upon online webinars to date 3.2 - Implement live-streaming
	4 - Lack of collaboration with similar organizations	4.1 - Increase collaboration with similar organizations
	5 - Ensure SE Refresher Course remains relevant	5.1 - Maintain relevancy of current SE Refresher Course
	6 - Most of SEAOI events are Chicago focused	6.1 - Improve offerings to locations outside of the Chicago area

Strategic Plan



COVER FEATURE

STRATEGIC PLANNING IN 4 HOURS OR LESS

WRITTEN BY: BILL GRAHAM

The organization has been valued by members for decades, but the past few years, they have been operating on autopilot. With a member retention rate of 70%, and events feeling more revenue-driven than member-focused, they have undeniable room to improve. It had been years since they seriously asked, "What do members want, need, or appreciate? Why do members leave? Why do they stay?" All the committees (like Audit and Investment) were focused inward (internally), directing their efforts to operations. Their mission statement was 50 words long and 15 years old. Most board members struggled to articulate the purpose for their existence. Goals had been set long ago. They were ambiguous, non-descript and hard to follow. No wonder the board never referenced the mission and goals.

STRATEGIC PLANNING

It had been ages since their board had a strategic planning meeting. This scenario is far too common for associations, chambers and other non-profits. Board members and staff alike push back at the suggestion of a retreat.

Their reluctance is expressed as, "But we know what we are doing! Besides, why waste time analyzing semantics?" That is likely to be followed by, "We're not really interested in game playing and group hugs."

To overcome the board objections, there are good reasons for strategic planning:

- Because your mission is the legal declaration that justifies your non-profit existence.
- Your goals are commitments ... by your board ... for your members.
- Together, they define your purpose and motivate your leaders.

An ignored mission statement makes board decisions arbitrary or whimsical. An applied mission statement guides a board's discussions and focuses their decisions.

Strategic planning meetings should be scheduled every 3-5 years, or they may feel more intrusive than helpful. Even when the need for a strategic plan is clear, organizations struggle to find days, or even a day for the board members to meet to focus on the non-profit's mission and goals.

In this case, the organization, a chamber, needed a new strategic plan. They wanted to clarify the mission, establish goals and agree in clear, action items. They needed a retreat. The leadership felt they only could get a quorum if they scheduled the meeting for just four hours.

EFFICIENT PLANNING

The president asked, "How much time will it take? My board says they don't have time and wonder why it takes a day?"

From experience, I said we can do it in four hours. How do you get a strategic plan from a half day retreat?" It can be done.

Some have misconceptions that their meeting will consist of unproductive discussions with an emphasis on, "Tell us how you feel ..." If this is the case with a board, there may be another option.

The half-day retreat is becoming increasingly popular. They require a very focused process. They can get measurable results. These meetings can also generate excitement and engagement. Everyone can feel heard. Time can be used effi-

ciently and effectively. An organization can get the outcomes it needs.

Remember paint-by-number? It was an outline of a picture. The artist colored it in. A well-structured retreat is an outline for future progress. Provide them the outline. They paint it.

For the organization mentioned above, here are some of the concepts that helped make their retreat work:

1. Hear Everyone Before the Meeting

- Weeks before the meeting, survey the board. Ask for direct answers: "In one sentence ..."
- Collect responses, then email the results in advance.
- Make time in the agenda to review the results.
- They will feel heard.

2. Give the Agenda a Time Schedule

- Open with an agenda timeframe and review
- Use the timeline: "You have 2 minutes!"
- Don't get stuck on semantics.
- Reduce finality: "Today's decisions are drafts for board approval."

3. PowerPoint Can Make Powerful Points

- It's easier to stay on topic when the focus is in big font on the wall.
- Move the process with slides:
 - Why Have a Mission?
 - Mission Statement Cautions
 - The Old Mission
- Re-write the mission statement in real time on the screen, it's exciting.

4. Assist the Facilitator

- Consider an assistant to keep the action moving.
- Facilitators get responses to get specific results.
- Assistants can take notes and write on flip charts.

There will still be discoveries. With this chamber, each breakout group independently concluded:

"We don't understand the membership! Member Research is needed ASAP!"

Meeting Agenda

8:00 – 8:30 Coffee
8:30 – 8:35 Agenda
8:35 – 8:50 Vocabulary, Survey Review
8:50 – 9:20 Mission, Vision, Values
9:20 – 10:00 Goals
10:00 – 10:10 Break
10:10 – 10:50 Strategies (in groups)
10:50 – 11:20 Strategy Report
11:20 – 11:40 Tactics in Groups
11:40 – 12:00 Tactics Reports
12:00 – 12:20 Lunch Break
12:20 – 12:40 Summarize
12:40 – 1:00 Wrap Up

The chamber board began the meeting with an agenda. They left with drafts:

- A 15-word mission (purpose)
- A Vision (desired outcomes)
- Values (guiding principles)
- Goals (core competencies to advance the mission)
- Strategies (programs and projects to advance the goals)
- Tactics (performance measures)
- Someone even volunteered to be the strategic plan champion.

The board members left with clarity about their roles. Some even laughed at how much had been accomplished. They were engaged and empowered.

Planning a strategic planning meeting ... it can improve an organization's future.

Of course, after the retreat adjourns, there will be more work to regarding implementation. The staff will want to create a timeline and assignments, committees will want to be engaged, and members should be informed of the priorities set by the leadership.

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Thank you
Questions?