

STRENGTHENING YOUR ORGANIZATION THROUGH STRATEGIC PLANNING

Presented by Joe Myer
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PLEASE SHARE YOUR EXPERIENCE

Who here has participated in strategic planning?

Did it generate a workable plan? Was it good?

Is the plan used today and are goals being accomplished?

What went wrong? What went right?

What did you or the organization learn from it?



The Significance of Planning

The premise for this session is that Strategic Planning is helpful and important!

“Productivity is never an accident. It is always the result of a commitment to excellence, intelligent planning, and focused effort.” ~ Paul J. Meyer

“Planning is bringing the future into the present so that you can do something about it now.” ~ Alan Lakein

“Plans are nothing; planning is everything.” ~ Dwight D. Eisenhower

*“Let our advance worrying become advance thinking and planning.”
~ Winston Churchill*

Board's Frame of Reference

Retrospective: Board tends to look backwards

- ▣ Highlights same accomplishments over & over – “good old days”
- ▣ Appreciates organizational history

Present: Board tends to look at the here & now

- ▣ Faithfully reviews current goals and present financial picture
- ▣ Has committees working & reporting

Future: Board tends to look forward

- ▣ Time is allocated at meetings to envision the future where members discuss what they want the organization to become
- ▣ Members assess lines of business and look at who is served
- ▣ Retreats are held regularly & strategic planning is viewed as essential”

What is Strategic Planning?

Answers the question:

Where does the organization want to be in three years?

- ▣ Take a step back from day to day operations
- ▣ Honest organizational assessment – strengths & weaknesses
- ▣ Look at changes in the external environment for opportunities and threats
- ▣ Revisit vision, mission, and core values
- ▣ Strategic thinking, creation of scenarios, all to achieve an end
- ▣ Develop ambitious yet achievable goals

A major role of Board GOVERNANCE!



Benefits of Strategic Planning

- ▣ Proactively focuses on the future
- ▣ Charts a course forward – a road map or GPS
- ▣ Factors in environmental changes
- ▣ Identifies short and long range opportunities
- ▣ Poises organization for greater success
- ▣ Enables organization to better achieve its mission
- ▣ Creates a greater role in determining its own destiny



Consequences of Not Planning

- ❑ Organization could become less relevant
- ❑ May miss the market you hope to serve
- ❑ Future could be out of control
- ❑ Flying by the “seat of your pants”
- ❑ Missed opportunities
- ❑ Unresolved problems
- ❑ Chaos



Look at the, Past, Present, & Future



Past: History & Heritage

- Why and when was the organization created?
- How has the mission & organization changed?
- Notable accomplishments. What difference has the effort made?

Present: Current Status

- Current strengths and weaknesses
- Organization's niche, what is it known for? What does it do better than any other?
- Status of leadership, finances, lines of business



Past, Present, & Future

Future: Desired or Preferred State

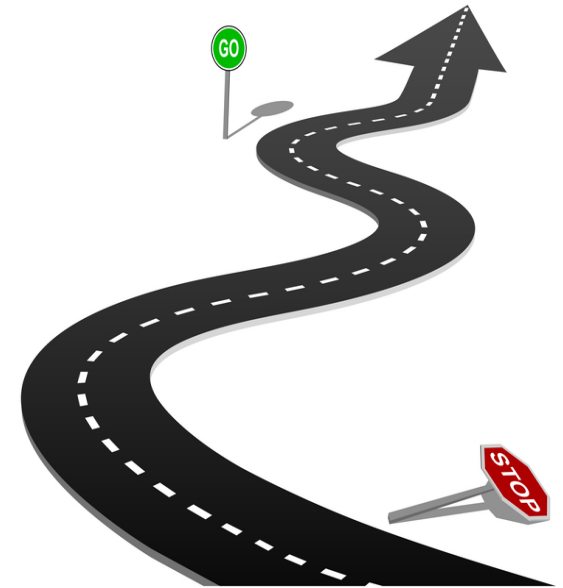
- Think about mission and vision
- Who do you want to serve?
- What is the environment suggesting to you?
- What opportunities do you see?
- What are natural areas for growth?
- Possible new programs and services

Strategic Planning Creates a Path

Past → Present → Future

How do we get to the future?

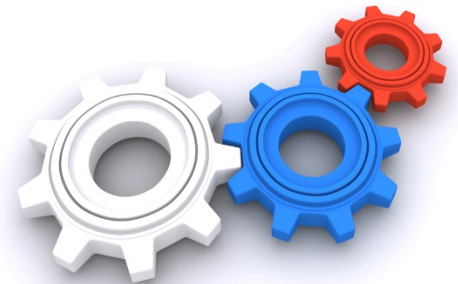
The best way is to plan and
establish a pathway



The Strategic Planning Process

An honest assessment, a testing of relevance, and viewing change on the horizon - making it work for you!

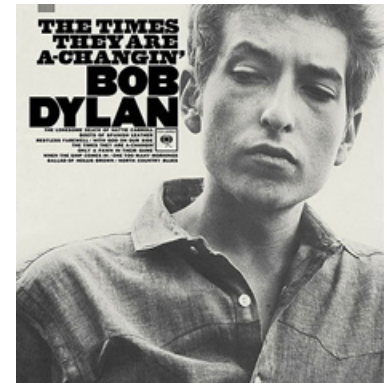
- ❑ A look at the environment and key trends
- ❑ Discover what stakeholders say and suggest
- ❑ Articulate strengths to build upon
- ❑ Admit weaknesses to correct or resolve
- ❑ Discover opportunities and threats
- ❑ Ask strategic questions
- ❑ Assess Mission
- ❑ Creatively develop strategic goals



The Times They Are A-Changin

Think about the environment in which you operate

- How is it changing?
- What is on the horizon? The forecast?
- What trends are you seeing?
- Are demographics changing?
- Opportunities and threats to consider?
- Be aware of market share, collaborations, strategic alliances, and competitors



Please share some ways your operating environment is changing

Difference from Business Planning

- ▣ **Strategic planning** is bigger picture, usually at a higher level, with impacts for the organization as a whole.
- ▣ **Business planning** is typically within a particular line of business (program or service) looking at revenues, projections, outcomes, staffing, etc.

A Setting for Strategic Planning



- ▣ Retreat away from regular meeting place/office
- ▣ Have a Board/Mgmt. committee plan the retreat
- ▣ Get casual, comfortable, and creative
- ▣ Invest \$ for a unique place, meals, lodging, fun
- ▣ Raise expectations with invitations/teasers
- ▣ Plan some things that will not soon be forgotten
- ▣ Allow for some “get to know each other” time

Share settings have you tried for planning retreats?

Strategic Planning Facilitation

Do it in-house or use an outside facilitator?

- ❑ In-house will cost less, but may not be as skilled
- ❑ Outside consultant may be more objective, and will allow everyone to fully participate
- ❑ Outside facilitator may enable the planning process to be deeper and more productive
- ❑ May be able to get a grant for strategic planning as funders know the importance of it

What has your experience been?

SWOT Analysis



Strengths, **W**eaknesses, **O**pportunities, **T**hreats

This is important to spend time on!

- Consider stakeholder interviews to get perspective
- (Board, staff, funders, etc.)
- Articulate strengths to build on and weaknesses to improve, openly and honestly
- Ferret out opportunities to take advantage of and threats to manage
- Write these up as a planning tool

SWOT Analysis



Examples:

- *Share an organizational strength to build on*
- *Share an organizational weakness to resolve*
- *Share an opportunity to take advantage of*
- *Share a threat that will have to be managed*



- Succession and leadership development
- Best practices
- Resource development
- Potential new lines of business
- Organizational development and structure
- Etc., etc., etc

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VISION QUEST



“A clear vision of the desired state of the organization is an essential component for high performance.” Tom Peters,
In Search of Excellence

It generates enthusiasm and commitment
and begins to chart a course of action

Vision:

- What do you most want to see happen?
- If you could “have it all”, what would it be?
- What would you most like to accomplish?
- What would you shoot for if there were no obstacles?
- What would you set out to do if you knew you could not fail?

MISSION Elements



Mission: Your organization's role in bringing about a change in "your world"

Typical Mission Elements:

- ▣ **Who** is served?
- ▣ **What** needs exist and how do the services/programs address those needs?
- ▣ **How** are those services carried out?
- ▣ **Where** are services delivered?
- ▣ **What** role the organization plays

Examples of Nonprofit Missions

Smithsonian - *The increase and diffusion of knowledge.*

The Humane Society - *Celebrating Animals, Confronting Cruelty.*

Heifer International - *To work with communities to end hunger and poverty and care for the Earth.*

Teach for America - *is growing the movement of leaders who work to ensure that kids growing up in poverty get an excellent education.*

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.*

Strategic Goals



Develop goals that:

- ▣ Enable fulfillment of the Mission
- ▣ Will take the organization from current to desired state
- ▣ Have the ability to be quantifiable and measured
- ▣ May be broad in nature and will need specific objectives, timeframes and resources to accomplish
- ▣ Consider a reasonable number of strategic goals, perhaps 10 or less overall



Examples of Strategic Goals



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- ▣ *Expand self-help housing into an adjacent county and research the feasibility of purchase repair*
- ▣ *Develop capacity to do site and subdivision development*
- ▣ *Raise \$250,000 in discretionary funds for reserves and opportunities*
- ▣ *Develop complimentary lines of business such as homeownership counseling, mortgage packaging, or rental housing development*
- ▣ *Improve financial management and human resources (HR) capacity*

Share strategic goals that your organization has:



What are some strategic goals your organization is undertaking?

What does it take to accomplish strategic goals?

MISSION:
ACCOMPLISHED

Each goal will have an action plan detailing what all is required to accomplish it

- Steps and activities that will lead to the goal
- Persons/teams responsible for achieving the steps
- Timeframes for accomplishing steps
- Price tag of financial resources to invest
- Evaluation and accountability
- These all should be part of your strategic plan

Plan Implementation

What do we do with the strategic plan?

- Put it on the shelf to gather dust?
- No, package it and use it!
- Implement it by assigning work, giving timeframes and making the strategic goals part of the business or annual operations plan
- Interpret it to staff and appropriate stakeholders
- Report on progress at Board and staff meetings
- Modify plan when assumptions change



Final Thoughts!

- Strategic goals must be integrated into the organization to assure action & implementation.
- A successful plan depends on preparation, allocation of resources, and willingness of key stakeholders to devote time and energy.
- A plan is a blueprint to be enacted, referred to often, followed, and amended at times.
- The strategic plan is your GPS
- What do you think?





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Thank You!