

Strategic Planning

An Overview of Strategic Planning Jefferson County Administrative Committee June 25, 2008

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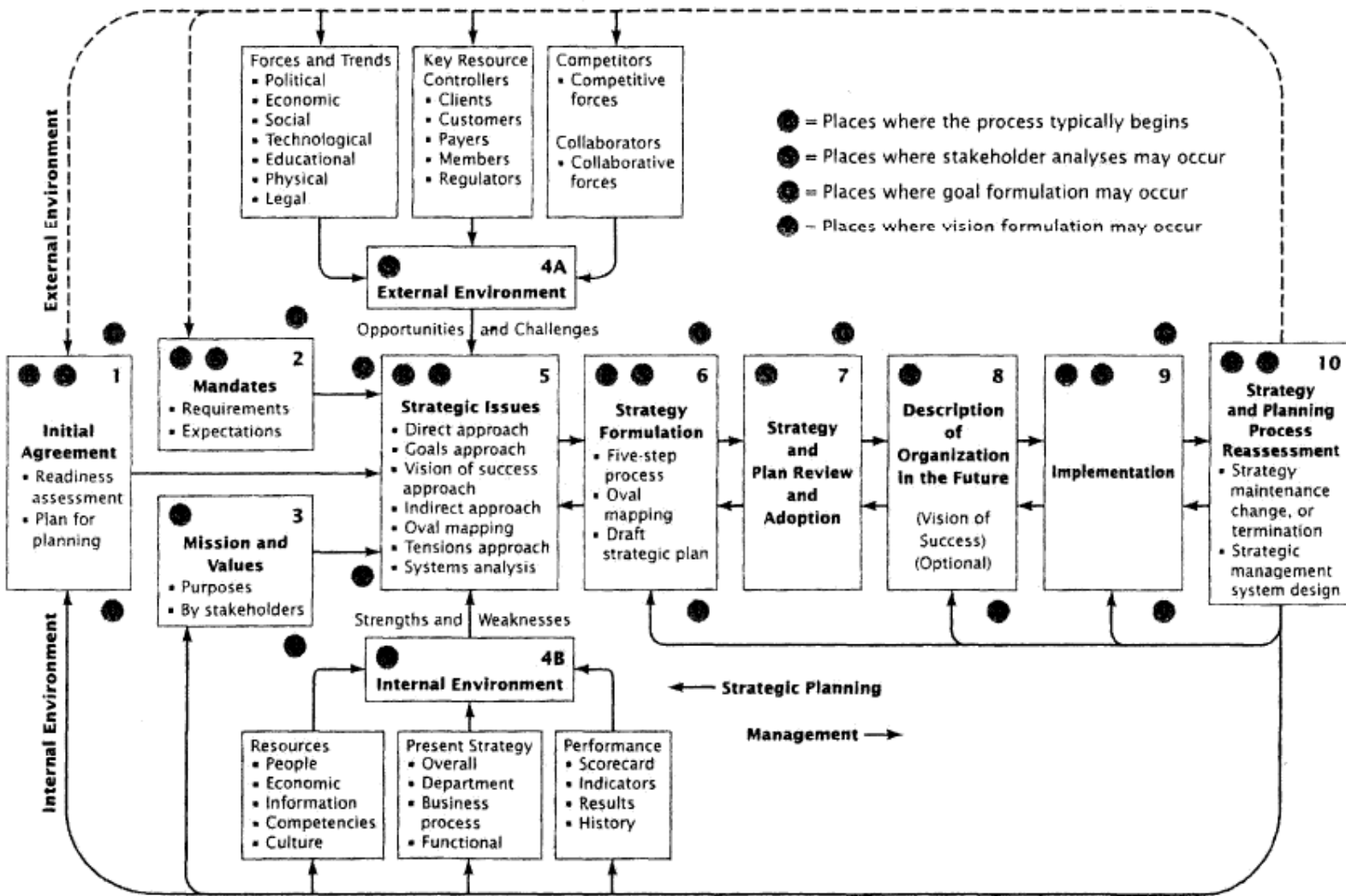


Context for Strategic Planning

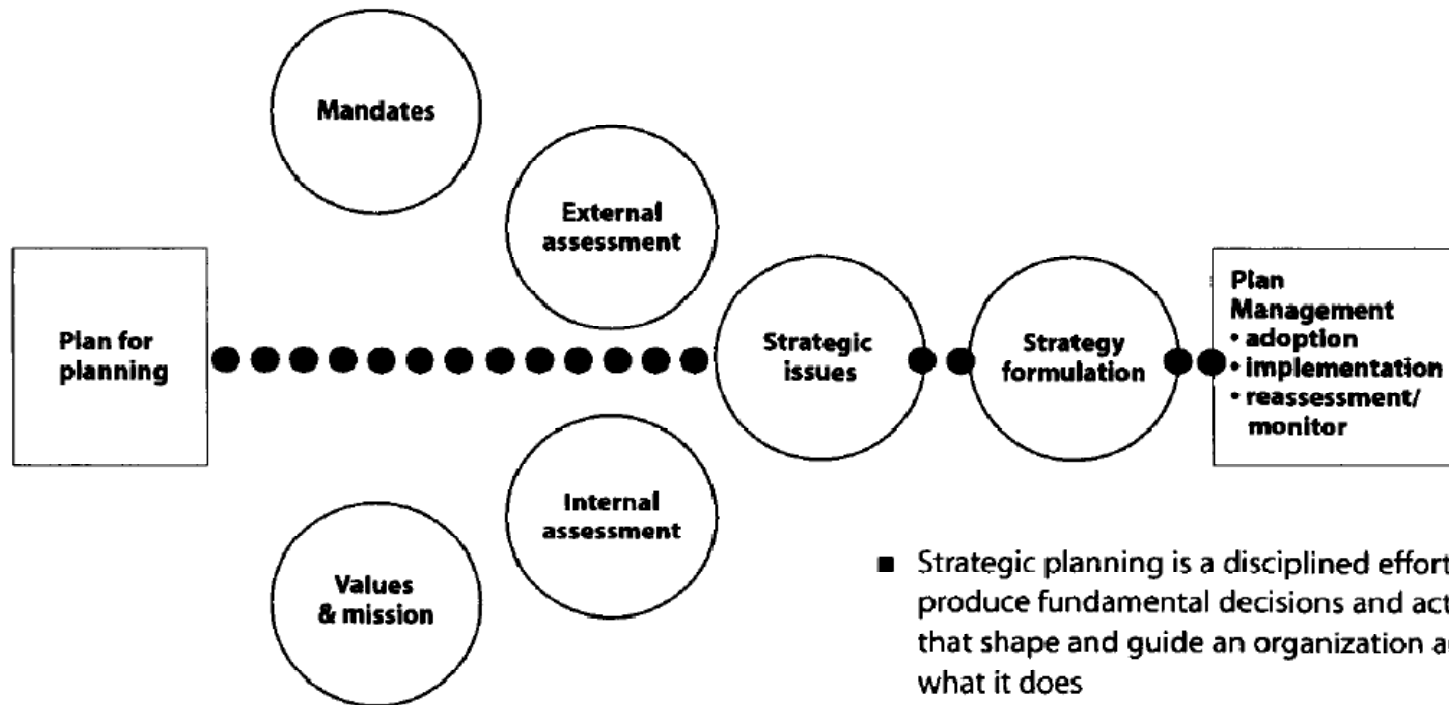
- ❖ Determine what is of most importance and what to do about it.
- ❖ Strategic Planning is about “the organization”.
- ❖ Customize the approach with a “plan for the plan”.

Figure 4 ■ The Strategy Change Cycle

From Bryson, John M. & Farnum, K. Alston. *Creating and Implementing Your Strategic Plan*. Jossey-Bass: San Francisco, 2005.



Overview of strategic planning process



Adapted from Bryson, etc.

- Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide an organization and what it does
- It's a powerful tool that helps organizations figure out what's really important and what to do about it



Step 1: Plan for Planning

- ❖ Diagnose organization's situation and readiness to plan.
- ❖ Develop the plan process, people to involve, process steps, etc.



Stakeholder Analysis

- ❖ People to involve and consider.
- ❖ Those affected by or who have an effect on the plan.
- ❖ External and internal.



Step 2: Mandates

- ❖ Formal – codified.
- ❖ Informal – community expectations.
- ❖ Informal may be embodied in norms and expectations of key stakeholders.

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Step 3 Developing a Mission



Mission Statement

- ❖ **Mission** = what an organization does.
- ❖ **Values** – what an organization believes, reflected in how it acts.
- ❖ **Vision** = what an organization wants to be in the future.



What is a Mission Statement?

- ❖ Purpose of the organization
- ❖ Its core function.
- ❖ The organization's reason for being – the “work” of the organization.
- ❖ What the organization does uniquely well.
- ❖ Mission/purpose should define the organization's intentions toward the clientele it serves.



Mission Statements Are Used To...

- ❖ Align what the organization says it does with what it actually does
- ❖ Align what the world believes it does with what it actually does
- ❖ Provide grounding for key decisions



Mission: Final Thoughts

- ❖ Similar to “purpose”
- ❖ Concisely explains **WHAT** the organization does and a bit of why
- ❖ It is important to periodically review and reflect on the mission statement

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Step 4 Assessments



Assessments

❖ Purpose for Assessing the Environment

- The purpose of Step 4 is to provide information on the organization's strengths and weaknesses in relation to the opportunities and challenges it faces.
- This step lays the foundation for identifying issues and effective strategies.
- The distinction between internal and external is fluid. Don't worry if distinctions are properly made.



Assessments

❖ Purpose for Assessing the Environment

- This exercise alerts an organization or community to conditions that may require a response.
- It provides a “systems view” of clues and prompts for possible issues, vision ideas and strategies.



Assessments

❖ Outputs and Tools

- Four lists comprise the classic Strengths, Weaknesses, Opportunities and Challenges (S.W.O.C.) Analysis

- Strengths
 - Weaknesses
- } Internal (past and present)
- Opportunities/Hopes
 - Challenges
- } External (future)



Assessments

- ❖ External Assessments: Areas to Monitor
 - PESTs (Political, Environmental, Social, Technological, etc.)
 - Selective and appropriate prompting when facilitating



Assessments

❖ Internal Assessments: Areas to Monitor

- A simple systems approach:
 - Internal resources and capabilities (Inputs)
 - Current internal strategies (Processes)
 - Internal performance (Outputs)

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STEP 5

Identifying Strategic Issues: *The Heart of Strategic Planning*



Identifying Strategic Issues

- ❖ All the data generated and process has led to this point.
- ❖ The issues identified during this step represent those the organization believes will significantly affect its future.

A Strategic Issue is...

- ❖ a fundamental challenge affecting the organization.
- ❖ Is different than an *'operational' issue.*

An Operational Issue...

- ❖ Is likely to confront the organization sooner rather than later and is more routine.
- ❖ if not addressed, will not significantly affect major organizational features such as mission, product or service mix, etc.



Characteristics of Strategic Issues

- ❖ Extensive impact on key stakeholders.
- ❖ Is responsive to mission.
- ❖ Extensive implications as suggested by the “assessments”.
- ❖ Significant consequences to the organization if not addressed.
- ❖ There is an ability to do something about the issue.



Benefits of Identifying Strategic Issues

- ❖ Attention is focused on what is most important.
- ❖ Attention is focused on issues.
- ❖ Identification of issues creates useful tension needed to prompt organizational change.
- ❖ Provides useful clues on how to resolve issues.
- ❖ The strategic planning process becomes “real” at this point.

Strategic Planning

Step 6 Strategy Formulation



Definition of a Strategy

- ❖ Is a pattern of purposes, policies, actions, decisions, and /or resource allocations that address a strategic issue.



Purpose of Step

- ❖ To create a set of strategies for each strategic issue that has been identified in Step 5-Strategic Issues.



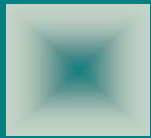
Exploring Possible Strategy Ideas

- ❖ What are some practical alternatives or initiatives that we might pursue to address this issue?
- ❖ What are the key actions that must be taken to implement the major initiatives?



Strategy Formulation

- ❖ What are the specific steps and who would be responsible for these actions?
- ❖ In selecting strategy, it is important to understand the feasibility and capability of actually carrying out the strategy idea.



Follow-Up Resources

- ❖ Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations*. San Francisco: Jossey-Bass, 2004.
- ❖ Bryson, John M. *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations*. San Francisco: Jossey-Bass, 2005.
- ❖ University of Wisconsin-Extension: Community, Natural Resource and Economic Development Programs and County Offices
 - <http://www.uwex.edu/ces/cnred/>
 - <http://www.uwex.edu/ces/cty/>