

# STRATEGIC PLANNING

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A Tool to Promote Organizational Effectiveness

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# AGENDA

## Part 1: The Basics

- Define “Strategic Planning”
- Benefits
- Stakeholders
- Roles and Responsibilities

## Part 2: About the Strategic Planning Process

- Strategic Planning Cycle
- Role of the Steering Committee
- Types of Information to Gather

## Part 3: Examples

- Terminology
- Example Strategic Plan

## Part 4: Implementation Planning

- Defined
  - Steps for Implementation Planning
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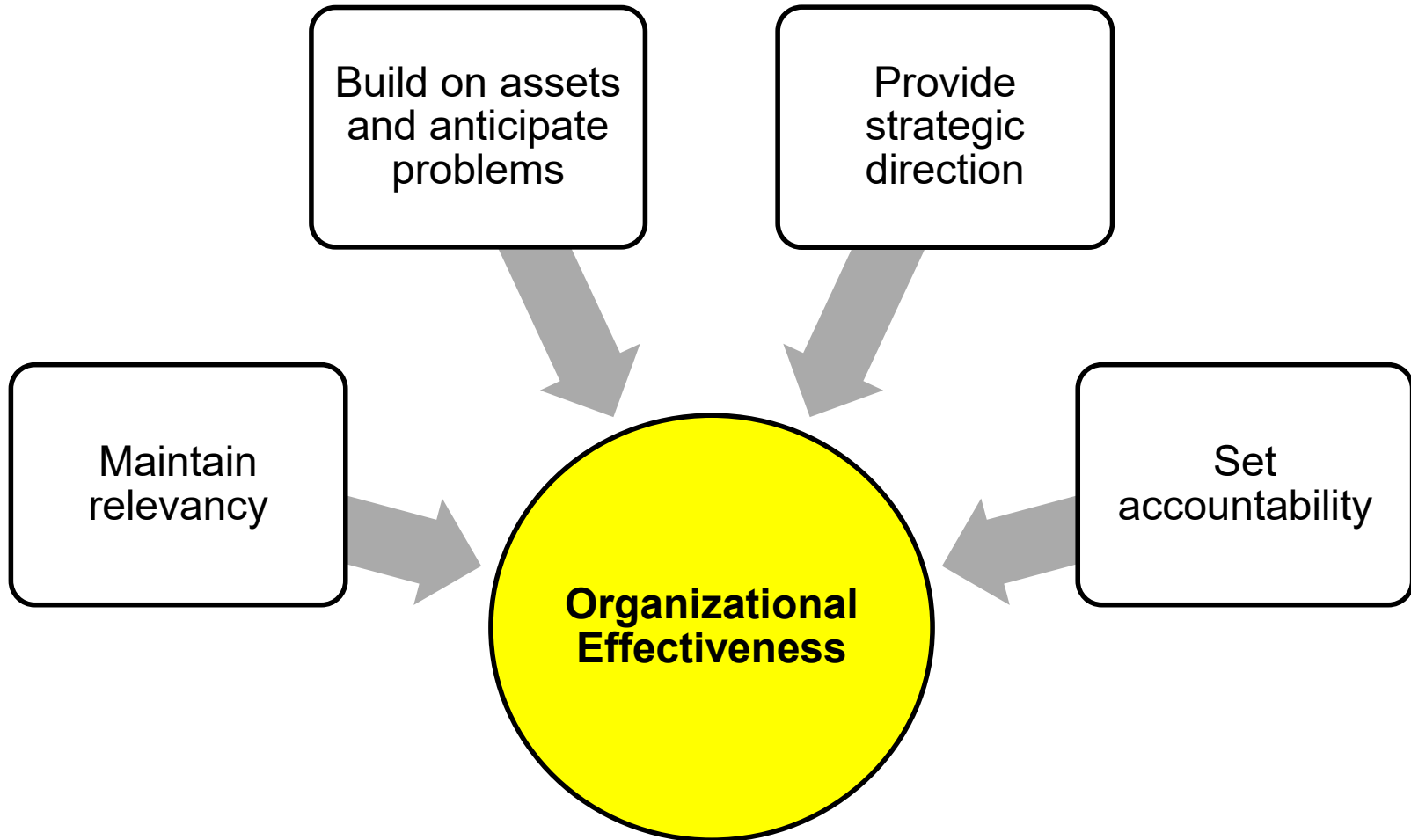
*Part 1*

# The Basics

**Strategic planning** is a process that:

- ✓ Involves multiple stakeholders
  - ✓ Assesses internal and external capacity
  - ✓ Utilizes evidence based research to set goals, priorities and strategies (high level activities)
  - ✓ Results in a Strategic Plan to guide the organization over a specified period of time (typically 3-5 years)
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# BENEFITS



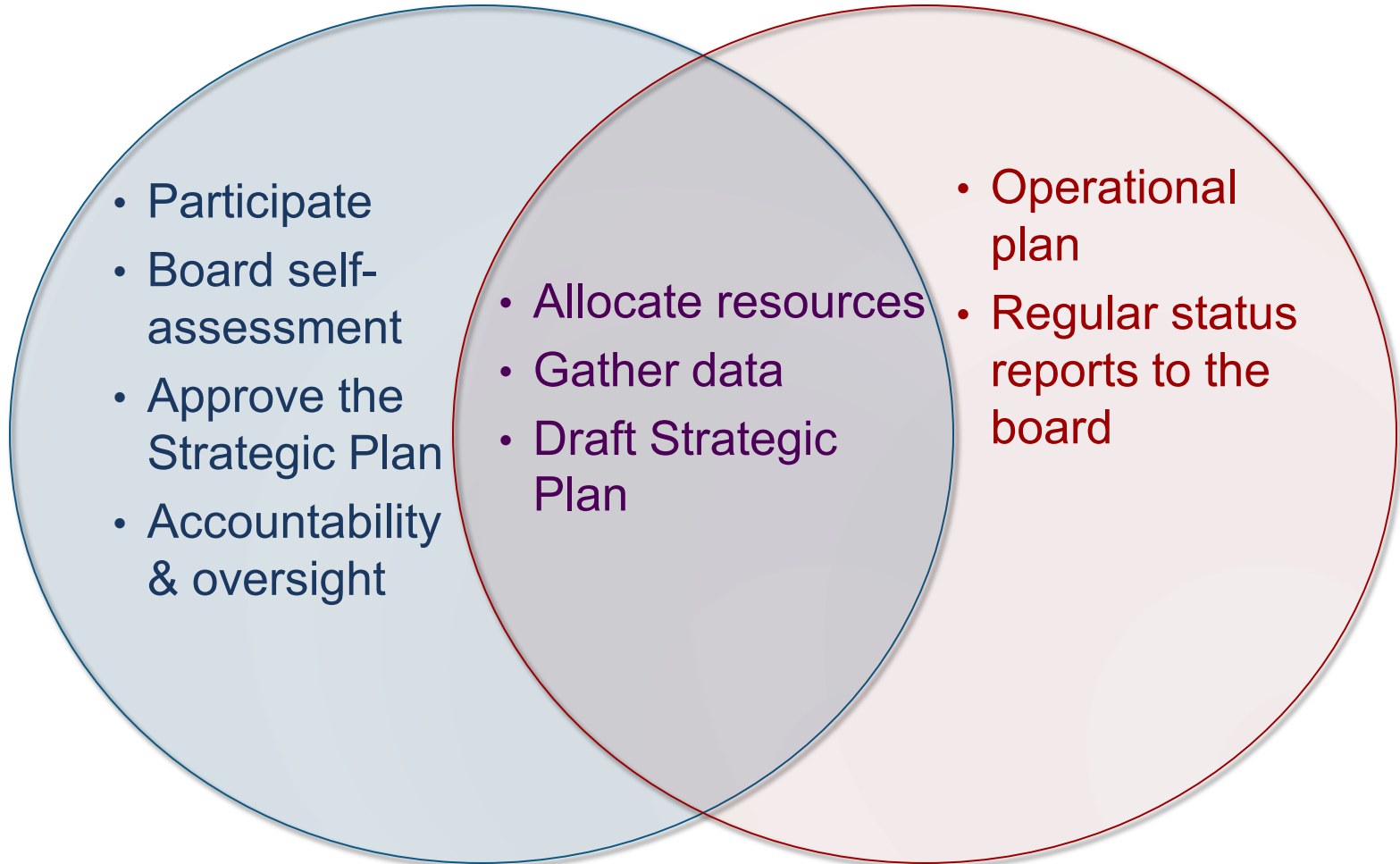
# Stakeholders for strategic planning:

- Full Board of Directors
  - Steering Committee
  - Executive Director/CEO
  - Key Staff Members
  - External funders, partners, experts, and/or program beneficiaries
  - Consultant
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# ROLES AND RESPONSIBILITIES

*Board*

*Staff*



*Part 2*

# The Process



# The Strategic Planning Process

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graph TD; C((The Strategic Planning Process)) --> P1[Phase 1: "Plan the Plan"]; P1 --> P2[Phase 2: Analyze Internal Capacity and External Influences]; P2 --> P3[Phase 3: Plan for the Strategic Planning Retreat]; P3 --> P4[Phase 4: Strategic Planning Retreat]; P4 --> P5[Phase 5: Review and Approve the Strategic Plan]; P5 --> C;
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## Phase 1: "Plan the Plan"

- Form Steering Committee
- Determine Process

Phase 2: Analyze Internal Capacity and External Influences

Phase 3: Plan for the Strategic Planning Retreat

Phase 4: Strategic Planning Retreat

- Report Phase 2 findings
- Draft the Strategic Plan

Phase 5: Review and Approve the Strategic Plan

# STEERING COMMITTEE

## Composition:

Board members  
Staff members  
Consultant

## Role:

- ✓ Guides the planning process
  - ✓ Recommends the approach, “plan the plan”
  - ✓ Oversees the information gathering phase and documents findings
  - ✓ Plans the Strategic Planning retreat
  - ✓ Provides recommendations for the Strategic Plan and submit to the board for review and discussion at the retreat
  - ✓ Prepares final document
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# Phase 2: Information Gathering Tools

Type of Assessment	Key Questions	Elements
Organizational Capacity Assessment	Internal strengths, areas of needed development and restrictions	<ul style="list-style-type: none"><li>- Mission, vision and value statements</li><li>- Project descriptions</li><li>- Organizational chart</li><li>- Financial data</li><li>- Funding profile</li></ul>
Environmental Scan	External trends that represent opportunities and threats for the organization	<ul style="list-style-type: none"><li>- Competitive analysis</li><li>- Expert review of relevant trends about the economy, laws, and demographic factors</li></ul>
Stakeholder Perceptions	Satisfaction with services, strengths and areas of needed development, perceptions of brand/visibility, and opportunities for the future	<ul style="list-style-type: none"><li>- Interviews</li><li>- Focus groups</li><li>- Electronic surveys</li></ul>

*Part 2*

# Definitions and Examples

# TERMINOLOGY

**Mission Statement:** Describes what the organization does; the constituency and geographical area(s) served; and summarizes the strategies used to accomplish the mission.

**Vision Statement:** The desired-end state for the organization or its mission. Answers the question of how society or the organization will change as a result of the organization accomplishing its mission.

**Values Statement:** Beliefs, standards or principles that guide the organization in accomplishing its mission as shared by the board and staff.

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# TERMINOLOGY

**Priority Areas:** The key organizational and programmatic areas that must be addressed in order to accomplish the organization's mission.

**Goals:** The highest-level change that can be reasonably achieved over the next 3-5 years.

**Strategies:** The high-level activities needed to accomplish the outcomes.

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# Sample Strategic Plan

PRIORITY AREA	2020 GOAL/OUTCOME	STRATEGIES
Early Learning	Add 750 high performing early childhood education seats serving DC Wards 7 and 8 to improve kindergarten readiness.	1. <b>New education seat creation:</b> Assemble the facilities, instructional staff, and support services necessary to replicate existing high quality early learning schools.
	Add 48 seats in faith-based preschool seats in the Baltimore Park Heights and Bronx High Bridge Communities.	2. <b>Continuous service improvement:</b> Partner with experts to research, develop, and implement new approaches in early childhood education.
Wrap Around Services	Provide wrap-around supports for 2,000 elementary school seats serving DC Wards 7/8, and for 2,000 seats in Montgomery County to improve the skills and social-emotional wellbeing needed for effective learning.	1. <b>Out of school time learning:</b> Provide after-school, summer, and extended day learning opportunities.
	Create wrap-around supports for 300 Kindergarten through 12th grade seats in faith-based partner schools serving Baltimore Park Heights and in the Bronx High Bridge Communities to improve the social-emotional wellbeing needed for effective learning.	2. <b>Special need student supports:</b> Expand and enhance services for students with learning challenges.
Knowledge Building	Support service providers in the development, understanding of and application of best practices in education and child development.	1. <b>Training.</b> Provide trainings for service providers using a diversity of platforms. 2. <b>Research.</b> Conduct research and evaluation for continuous program improvement and to add to the field of child development. 3. <b>Facility Development.</b> Build a training facility at Dinwiddie Farm in Virginia.
Infrastructure	Add 4,000 high performing elementary school seats serving DC Wards 7 and 8 to improve academic success and social emotional well-being.	1. <b>School construction.</b> Create a revolving loan fund to allow the expansion of high quality public charter schools.
	Add 100 high performing faith-based elementary school seats serving the Baltimore Park Heights and Bronx High Bridge Communities to improve academic success and social emotional well-being.	2. <b>Technical assistance.</b> Support organizational capacity building such as board development or systems improvement.
Internal Organizational Effectiveness	Build and adopt the internal HR, evaluation and communications systems to make Commonweal a best-in-class organization.	1. <b>Evaluation.</b> Implement a monitoring and evaluation system to consistently evaluate program performance. 2. <b>Branding and Communications.</b> Expand Commonweal's public awareness among stakeholders and the general public. 3. <b>Professional development.</b> Develop and maintain systems and tools to ensure continuous growth of Commonweal staff. 4. <b>Governance.</b> Continue expanding the Board's programmatic expertise and developing future leaders. 5. <b>Investments.</b> Implement a new investment policy and procedures, including

*Part 3*

# Implementation Plan



**Implementation planning** is a management tool led and managed by staff that translates strategies and plans into action.



<b>Goal 1, Strategy 1</b>				
<b>Timeframe</b>				
Initiative	Initiative Outcome	Person Responsible	Resources Needed	Timeframe

# IMPLEMENTATION PLANNING STEPS

## Understand the Strategic Plan

- What are we supposed to achieve?
- Which elements might impact my work, department, etc.?

## Think about broad 5-year benchmarks

- What milestones do we need to meet each year in order to achieve our strategic outcomes?

## Determine what needs to happen in the first year

- What key initiatives do we need to implement to reach our year one milestones?
- What are the expected outcomes?

## Develop Implementation Plan

- How will we achieve these initiatives?
  - Who will be involved, what additional resources will be needed, and when will the initiatives start and end?
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*Wrap Up*

# Questions and Discussion