

# Strategic Planning for NIGP Chapters

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# Today's Agenda

- The Purpose of Planning
- A definition of Strategic Planning
- How the process will benefit your Chapter
- Benefits and Pitfalls in Strategic Planning
- Strategic Planning Model
- Basic Terms
- Strategic Planning Processes
- Use of Facilitators
- Successful Planning and Implementation
- Thoughts regarding short and long range planning
- Sample Strategic Plans – NIGP Chapters



# The Purpose of Planning

- The purpose of strategic or long-range planning is to assist the Chapter in establishing priorities and to better serve the needs of the membership.
- A strategic plan must be flexible and practical and yet serve as a guide to implementing programs, evaluating how these programs are doing, and making adjustments when necessary.



# Purpose of Planning

- A strategic plan should reflect the thoughts, feelings, ideas, and wants of the developers and mold them along with the Chapter's purpose, mission, and regulations into an integrated document.



# A Definition of Strategic Planning

- Simply put, strategic planning determines where a Chapter is going over the next year or more, how it's going to get there and how it'll know if it got there or not. The focus of a strategic plan is usually on the entire organization, while the focus of a business plan is usually on a particular product, service or program.



# A Definition of Strategic Planning

- A Strategic Plan should be:
  - Simple
  - Written
  - Clear
  - Based on current situation
  - Able to be implemented over a period of time
  - Reviewed and revised as priorities change

# ★ How the Process will Benefit Your Chapter ★

- Membership clearly understands the purpose of the Chapter
- Ensures the most effective use of the Chapter's resources
- Builds consensus on where the Chapter is going
- Builds strong teams within the Chapter
- Provides the glue that keeps Board members together
- Increased efficiency and effectiveness of the Board of Directors



# Benefits of Strategic Planning

- Bring clarity and agreement on mission and vision
- Help Chapters prepare for the future
- Help Chapters anticipate and manage change
- Improve the decision-making processes
- Promote effective stewardship
- Educate participants about institutional history
- Identify existing strengths in the Chapter
- Provide an opportunity to analyze the Chapter's strengths, weaknesses, systems and processes
- Reinforce the need to commit to continuous improvement





# Pitfalls in Strategic Planning

- The plan may not turn out as well as expected because of changes in the environment in which the plan is supposed to operate
- If the planning process itself is weak, the resulting plan may be weak and not satisfactory to the Chapter
- Not understanding that strategic planning is worthless in getting an organization out of a major crisis. A crisis is a current problem not solved by a strategic plan



# Strategic Planning Model

- Mission Statement
- Vision Statement
- SWOT Analysis
- Objectives
- Goals
- Action Plan

# Some Basic Terms in Planning

- Goals
- Strategies or Activities
- Objectives
- Tasks
- Resources

# Strategic Planning Process

- Reference Overall Singular Purpose ("Mission") or Desired Result from System
- Take Stock Outside and Inside the System
- Analyze the Situation (SWOT)
- Establish Goals
- Establish Strategies to Reach Goals
- Establish Objectives Along the Way to Achieving Goals
- Associate Responsibilities and Time Lines With Each Objective
- Write and Communicate a Plan Document
- Acknowledge Completion and Celebrate Success



# ★ The Use of Facilitators to Help You with Planning ★

- You may want to consider using a facilitator from outside of your organization if:
  1. Your organization has not conducted strategic planning before.
  2. For a variety of reasons, previous strategic planning was not deemed to be successful.
  3. There appears to be a wide range of ideas and/or concerns among organization members about strategic planning and current organizational issues to be addressed in the plan.



# ★ The Use of Facilitators to Help You with Planning ★

4. There is no one in the organization who members feel has sufficient facilitation skills.
5. No one in the organization feels committed to facilitating strategic planning for the organization.
6. Leaders believe that an inside facilitator will either inhibit participation from others or will not have the opportunity to fully participate in planning themselves.
7. Leaders want an objective voice, i.e., someone who is not likely to have strong predispositions about the organization's strategic issues and ideas



# ★ Successful Planning and Implementation ★

- Involve the right people in the planning process
- Write down the planning information and communicate it widely
- Goals and Objectives should be SMARTER
- Build Accountability
- Re-plan Accordingly
- Evaluate the planning process and the plan
- Acknowledgment and Celebration of results



# ★ Thoughts Regarding Strategic Planning ★

- In order to achieve a sound basis for the development of programs and activities, systematic planning efforts must be undertaken.
- The first time is always the hardest
- The Chapter's future may depend on it
- You cannot get to your destination unless you know where you are going





# Sample Strategic Plans

- Arizona State Capital Chapter
- Texas Association of Public Purchasers
- Southeast Florida Chapter

