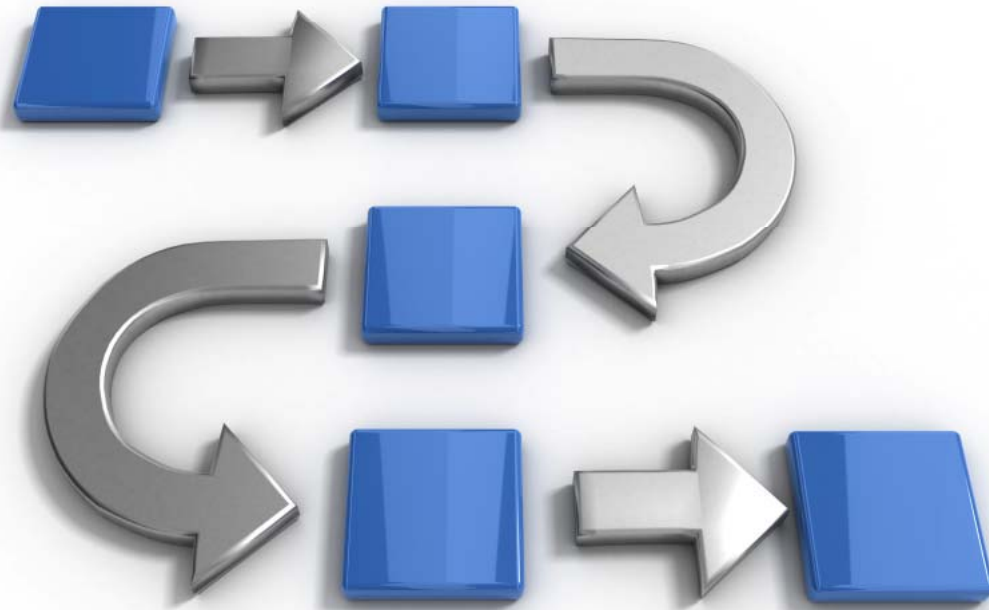


Retreat to Advance:

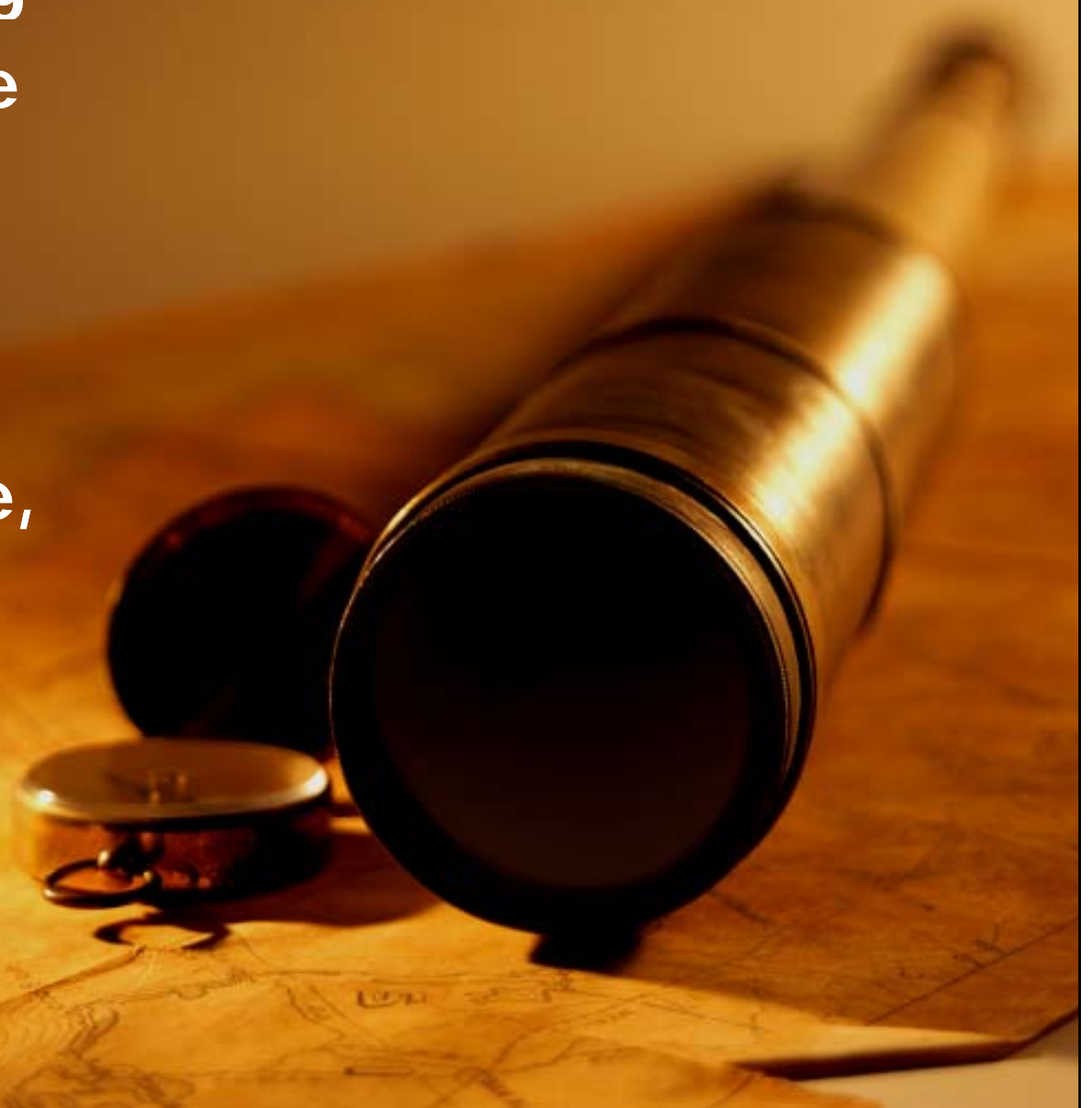
The Process of Strategic Planning



Nora Riva Bergman

What is strategic planning?

Strategic planning determines where an association is going in the future, how it's going to get there, and how it will know if it got there or not.



Three Phases of Strategic Planning

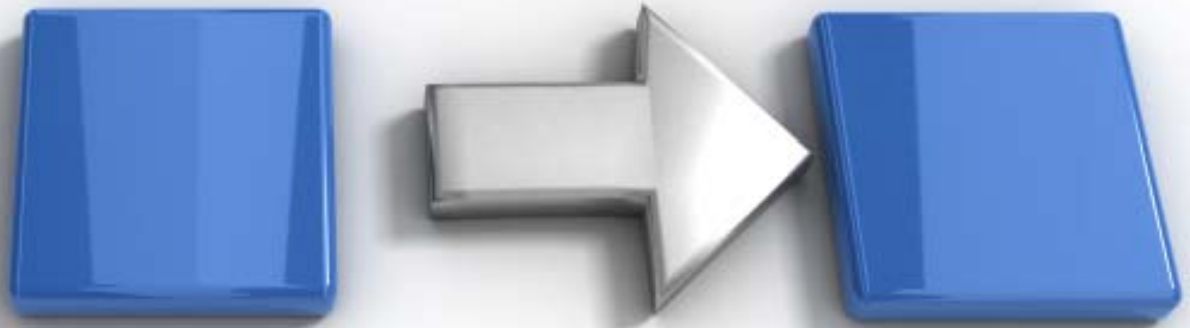


1. Pre-Retreat: Planning & Preparation



2. The Retreat: Content and Logistics

3. Post-Retreat: Implementation, Measurement, Review



Three Phases of Strategic Planning



1. Scanning the environment



2. Creating the plan/setting objectives



3. Translating the plan into results

What is strategic planning?



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Traditional v. Results-Oriented Planning

Improve present model

Short-term objectives

Focus on tactics,
activities

Needs defined as
gaps in resources

Focus on
current
members

Goals are vague

Visions are short-term

Sees association as
collection of parts

Paradigm busting

Long-term objectives

Focus on designing
the future

Needs defined as
gaps in results

Focus on
members &
non-members

Objectives are SMARTER

Visions are long-term

Relationship between
parts is emphasized



Why are we changing?



A person wearing a dark suit jacket and a white shirt is holding a glowing blue globe of the Earth. The globe is held in both hands, and it has a grid of white lines representing latitude and longitude. The background is black.

Bar leaders are the caretakers of their associations.

"Treat the earth well: it was not given to you by your parents, it was loaned to you by your children. We do not inherit the earth from our ancestors; we borrow it from our children."

- Native American Proverb

Don't be afraid to ask the hard questions.

1. Why are we changing?
2. What are we changing to?
3. What are we changing? And what is staying the same?
4. How can we change effectively?
5. How can we measure whether change has occurred?
6. Is it the right change?
7. Have we improved performance & payoffs as a result?
8. Was the change worthy enough to justify the effort?



From *Strategic Planning for Success: Aligning People, Performance and Payoffs*,
by Roger Kaufman, Hugh Oakley-Brown, Ryan Watkins, and Doug Lee

6 Steps to Understanding Change

1. The goal is not to innovate the most.
2. It's not enough to have the best ideas.
3. Appreciate the implementation dip.
4. Redefine resistance.
5. Reculturing is the name of the game.
6. Never a checklist, always complexity.

From *Leading in a Culture of Change*, by Michael Fullan

Laying the foundation for success.

Commitment & support of top leadership, especially the president and executive director

Commitment to clarifying roles for all participants in the planning process

The right mix of individuals on the planning committee: board members, staff, members, non-members, visionaries, detail-oriented thinkers

Willingness to encourage board participation so that people feel "ownership" of the process

Adequate commitment of resources of staff time and dollars

A willingness to change the status quo

No serious conflict between key players



Scan the environment.

Relevant documents to gather include:

- The association's mission statement and values statement
- Current strategic plan
- Needs assessments, member satisfaction surveys, SWOT surveys
- Financial statements
- Budget reports
- Internal procedure manuals
- Board manual
- Board minutes



What is strategic planning?



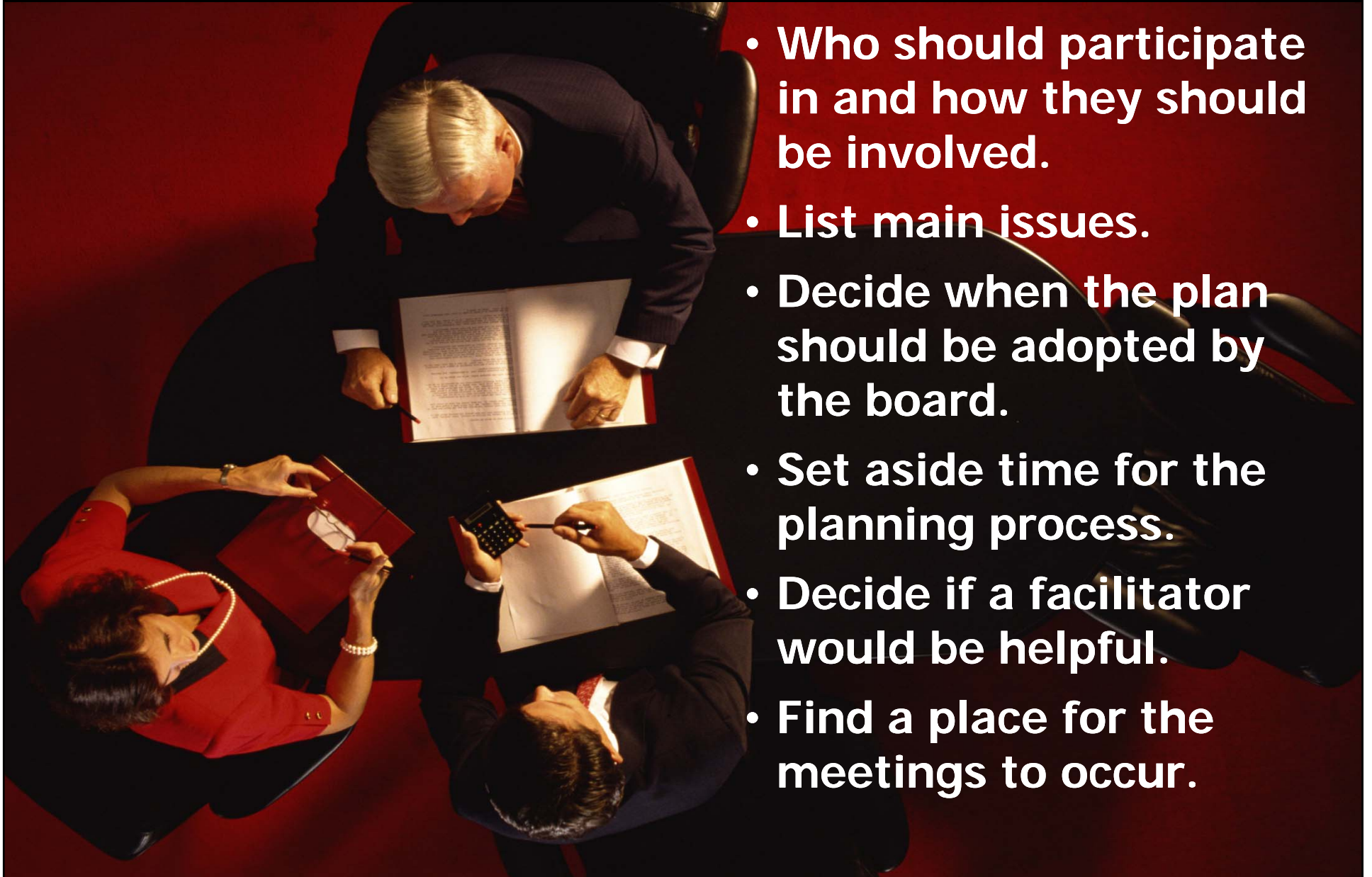
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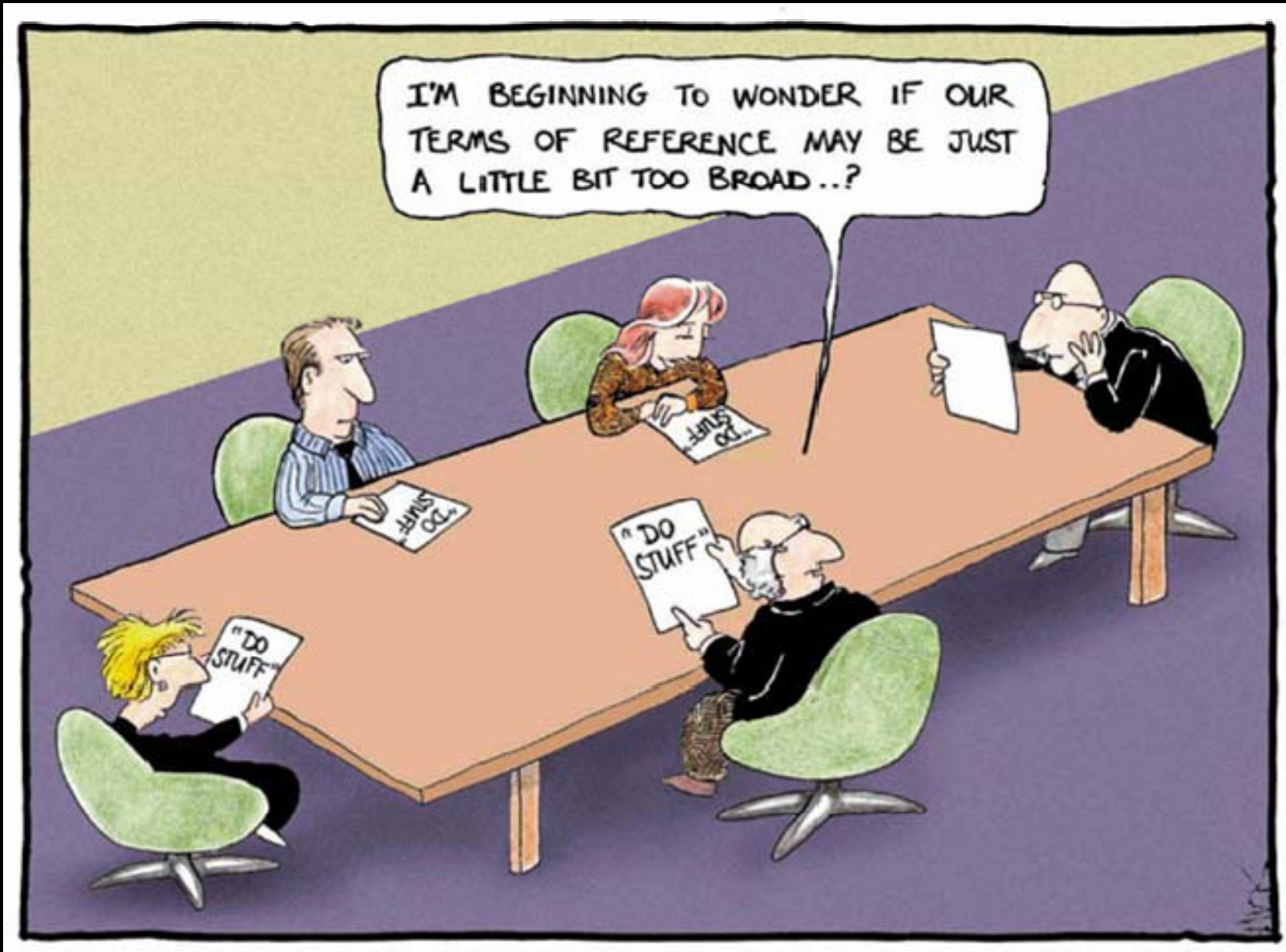
3. Post-Retreat: Implementation, Measurement, Review

Creating a successful retreat

- Who should participate in and how they should be involved.
- List main issues.
- Decide when the plan should be adopted by the board.
- Set aside time for the planning process.
- Decide if a facilitator would be helpful.
- Find a place for the meetings to occur.



Developing Objectives and Timelines



Use SMARTER Objectives

S = written for a *specific* result.

M = Observable and *measurable*.

A = The objective is *audacious*.

R = Clearly define the *results* to be achieved.

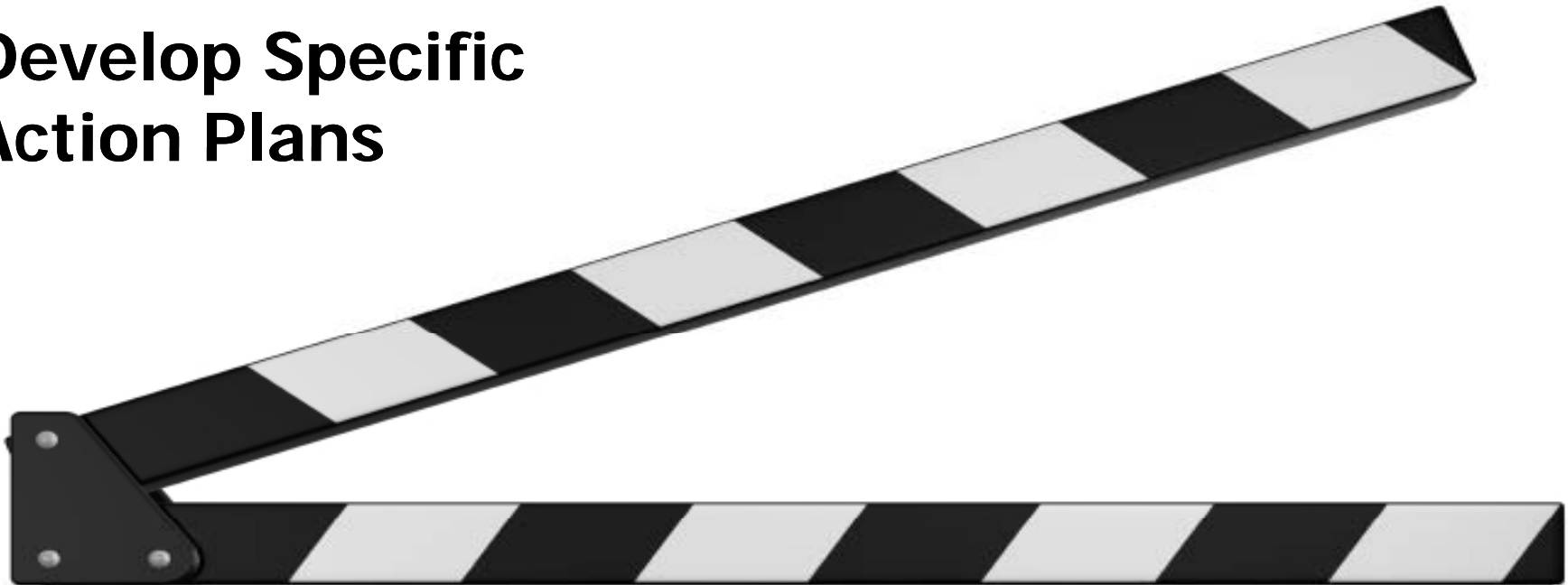
T = Targeted *time* for completion.

E = "Sum total" of all objectives are *encompassing*.

R = Objectives are *reviewed* frequently.

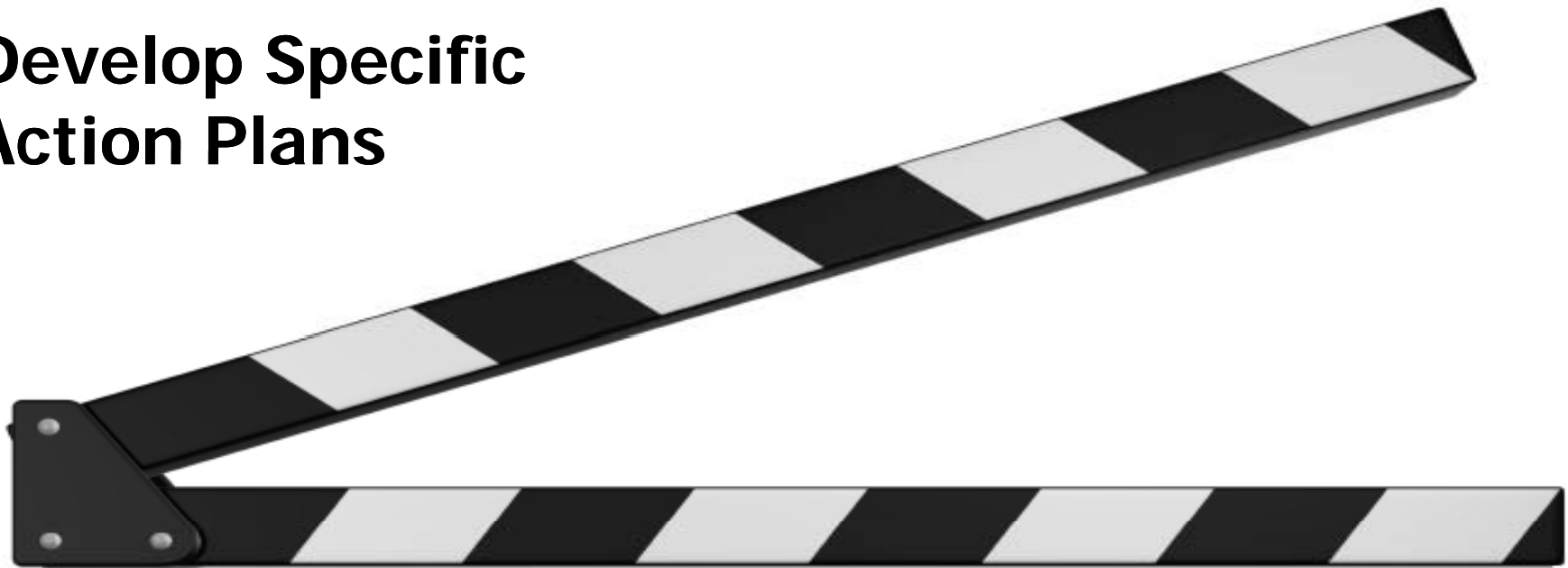


Develop Specific Action Plans



1. Actions plans = Who, What, by When, How + Measurement
2. Develop an overall, top-level action plan that depicts how each strategic objective will be reached.
3. Develop an action plan for each SMARTER Objective in the strategic plan. These plans, in total, should depict how the overall action plan will be implemented.

Develop Specific Action Plans



4. The Action Plan for each SMARTER Objective, might specify:
- The steps to achieve each objective to be accomplished
 - How each objective contributes to the association's overall strategic goals
 - What specific results (or objectives) much be accomplished that, in total, reach the goal of the association
 - How those results will be measured
 - When the results will be achieved (or timelines for each objective)
 - Who is responsible for overseeing each objective's completion

Appoint a Plan Champion



What is strategic planning?



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Now what?

How do we ensure implementation of our plan?

- When planning, involve people responsible for implementing.
- Ensure the plan is realistic. “Can we really do this?”
- Organize the overall plan into smaller action plans.
- Include action plans in the overall plan.
- Clarify the plan’s implementation. Build in reviews.
- Translate actions into job descriptions.
- Publicize the plan. Celebrate successes!



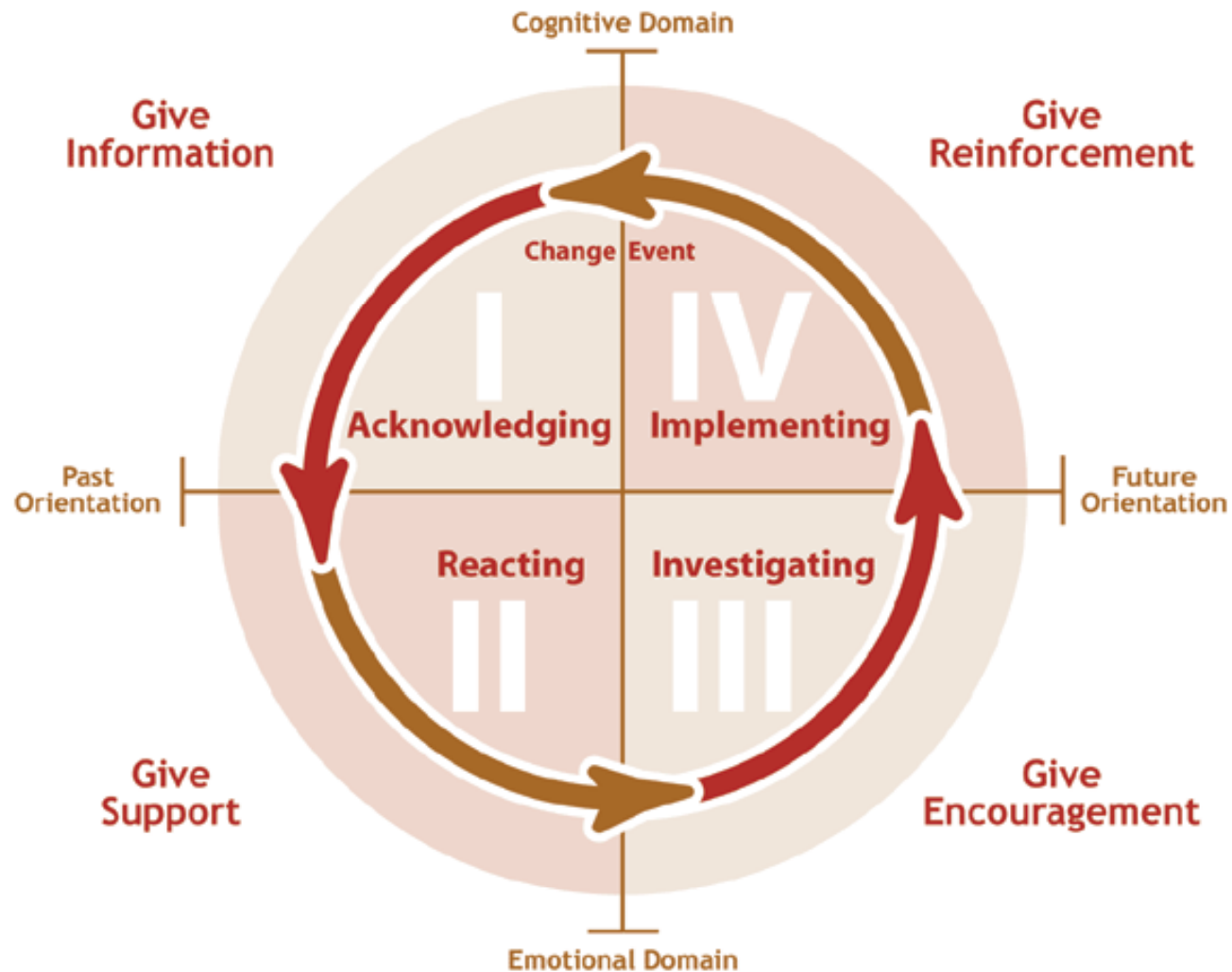
Support Your Team Through the Implementation of the Plan



For most of us . . .
Change = Unknown = Fear

Four Stages of Change

Discovery Learning Change Process Model



From *Dangerous Opportunity: Making Change Work*, Chris Musselwhite and Randell Jones

Measure progress and continuously review



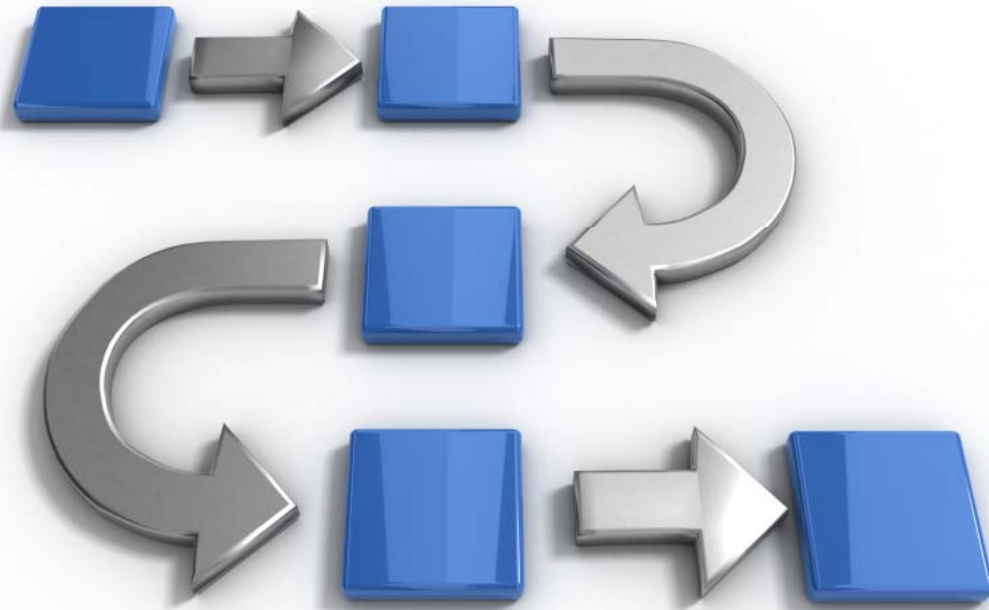
- Review plan at each board meeting
- Champion report each quarter

In the years between planning, focus on the following questions:

- Is the current plan on target?
- What has not been accomplished?
- Based on current issues, do we need to revise the plan?
- Are there new performance targets or checkpoints that need to be addressed?

Retreat to Advance:

The Process of Strategic Planning



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