

# Guide to Strategic Planning

October, 2004

## **WHAT**

Strategic planning is the process of determining what an organization intends to be in the future and how it will get there. Developing this vision is an important first step in every aspect of organizational development, whether it is programme and project design, membership recruitment or communication.

To convince prospective members that an organization is worth joining, existing members must be able to explain in a few words what it does, what it hopes to accomplish and what it has to offer. This is a problem when the purpose and goals are not well defined and members themselves don't understand what the organization is trying to do.

Strategic planning helps an organization to:

- build a sense of community and common goals
- stimulate forward thinking and clarify future directions
- solve major organizational problems
- build teamwork and expertise
- influence rather than be influenced
- meet needs of members
- survive with less.

A Strategic Plan can be thought of as a road map for your club's future. If created thoughtfully, an effective plan will help you identify where you need to be and how to get there. A plan is more than a to-do list. It is an evaluation and connection to what is important.

## **Components of a Strategic Plan**

At the most basic level, there should be a statement of "Purpose" and "Vision". The Purpose should define why the club exists. The Vision should define what the club can/should be in an ideal world.

The Vision can then be expanded upon with the Goals. Goals are statements that will clarify and enhance the key points of the Vision statement. They are

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typically very long term in nature, and may be stated in such a way that there is not actually an end point to them.

Goals are then distilled into Objectives. These are shorter term, actionable statements. One Goal may have several objectives associated with it, and these may change over time (as they are accomplished), while the Goal remains in place. At any given time, not every Goal will have Objectives associated with it.

Finally, the pedal hits the metal with an Action Plan. These are the specific steps, responsibilities and deadlines that will realize the achievement of the Objectives.

## ***WHY***

### **What a Plan can do for you**

Just as in everyday life, it is all too easy to allow our club life to cruise along enjoying the status quo. Some may argue, “If it isn’t broken, why fix it?” If we fail to pay attention to where we are going, it is not difficult to drift off course over time. By identifying what the priorities are, you will be better able to focus on them and set aside matters that are less important.

Some things to keep in mind when you are developing your own strategic plans are CFUW and Ontario Council themes and CFUW goals.

By going through the Strategic Planning Process, you can ensure a balance is being met by your club. The process is perhaps as important as the “The Plan” itself. If it were possible to have someone just hand you a plan for your club, the value would actually be limited. Much can be discovered by going through the planning process. It may be that by addressing certain issues, others will naturally fall in place. It may also be discovered that what was perceived to be a root problem, is actually just a symptom of another problem.

Every club is individual in nature and there is no set answer for all clubs. There is only what is right and works for you.

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## ***HOW***

The basics of the planning process outlined here are drawn from the IFUW Leadership Training Materials. These can be found at [www.ifuw.org](http://www.ifuw.org). There is also a printed version of the materials that has a more robust introductory component and more complete suggestions for implementation plans. All details can be found on the IFUW website in the “Leadership Resources” section, accessed from the homepage.

These steps are a suggested approach. There are many possible variations. Smaller clubs may decide to include the whole membership in each of the development steps, eliminating the need to perform distinct focus groups. Consider also an array of forums for discussion and gathering input, such as club general meetings, special breakfast or lunch meetings, using facilitators with small groups or a wider discussion.

### 1. Form Planning Committee

A core group is needed to lead the planning effort. It is recommended to use members from a variety of experiences and tenure with the club, not just the current year’s executive. For example, a collection of past presidents, executive committee members (past and present), “general” members that have been with the club for many years, and those that are newer to the club, would create a good working group.

While it is important that the general membership be well involved, the planning committee will be the ones to guide the project, facilitate focus groups with the broader membership, and refine the final plan documentation.

### 2. Identify Timeline and Participants

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At the Planning Committee's first meeting, the timeline for developing the plan should be defined. One of the biggest factors influencing this will be the form the participation by the general membership will take. In general, the more people involved, the longer the process is likely to take. Meetings will need to be scheduled farther in advance and there will be more data to consolidate.

For each of the remaining steps, the Planning Committee must identify who will be involved in the exercises to complete the step.

## **3. Develop Purpose**

A Purpose statement should define why the club exists. An example might be: CFUW-Our Town, a member of CFUW and IFUW, is an organization of women graduates committed to:

- Promote the pursuit of knowledge and education
- Participate in public affairs
- Provide opportunity for fellowship, support and networking
- Provide scholarships to women in the community

For an exercise to help develop a Purpose statement, please see the Appendix. This exercise may be completed in advance or done at the time of the meeting by the participants.

## **4. Situational Analysis (a.k.a SWOT analysis)**

It is important to assess the environment in which the club operates and the current status of the club. This can be accomplished with a Situational Analysis or SWOT (Strengths, Weakness, Opportunities, Threats) analysis.

Please refer to the appendix for this exercise which may be done in advance or at the time of the meeting, individually or in a group.

## **5. Focus Groups**

The use of Focus Groups is not specifically addressed in the IFUW materials, but can be a useful way to involve the broader club membership, without the

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formality of the exercises in any of the other steps. This step can be considered optional if the club is small, and a large proportion of the club is participating in the rest of the process.

The aim of the focus groups is to gather input from the general club membership on specific topic areas to be compiled with the other work of the Strategic Planning Committee. Groups may be conducted on topics such as fundraising, membership, community participation, advocacy, resolutions, scholarships, interest groups and club operations.

For detailed guidelines on conducting focus groups, please refer to the “Notes for Focus Group Leaders” in the Appendix.

## 6. Define Vision

The Vision of the club should express the ideal state of being. When you are defining your vision, be imaginative when you brainstorm!

It may be an expression of a static state, or a state of continued being. For example: “CFUW-OurTown will be the organization of choice, that grows and evolves to meet the needs of women graduates.

A statement of Values may also be used to enhance the Vision. For example: CFUW-OurTown values promoting education, promoting participation in the community, and providing fellowship and support among our members.

## 7. Define Goals

The statement of Goals provides the first level of direction on how to pursue the Vision in accordance to our Values. Before trying to define Goal statements, the following definitions should be understood.

**VISION:** A picture of where and what we want to be in the future. It reflects both our purpose and goals.

**GOALS:** The desired results we seek, expressed in general terms. They are long-term, open-ended, and never "finally"

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achieved. Getting close to these goals takes us towards our vision.

**OBJECTIVES:** Specific and concrete outcomes to reach in moving towards our goals. Milestones or markers in the never-ending pursuit of goals

To change visions into goals the picture described in the vision must be re-written in terms of the desired results. For example "*I see a large meeting with many new members from different parts of our community*" becomes: "*to build a strong organization representative of women across our community*" or "*I see young girls and women learning together in a room of their own near the market*" becomes: "*to provide educational services addressing unmet needs of girls and women.*"

**EXERCISE** – Development of Goal statements is best done as a brainstorming exercise, which may be done as a whole group or smaller ones that come together to debrief and consolidate the brainstormed list.

Some examples of Goals:

- To advocate that governments hold public education as a top priority.
- To provide support for women and girls to pursue higher education.
- To provide our members with opportunities for lifelong learning.
- To create awareness of community issues.
- To provide opportunities to meet with members with similar interests.
- To promote an atmosphere of inclusion and support.
- To leverage the expertise of our members.
- To maintain a dynamic governing structure that enables achievement of our vision.
- To replenish our membership by continually attracting and retaining new members.

## 8. Identify Objectives

Objectives describe concrete outcomes, related to the goals. These tell us "WHAT" and "WHEN". Since a Strategic Plan should be a living document, not every Goal will necessarily have Objectives associated to it, and some may have several. As time passes, and Objectives met, new ones will need to be identified.

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**EXERCISE:** Participants should review the list of Goals and decide which ones will have Objectives defined. Then, for each Goal, one or more Objective statement should be created, keeping in mind the following characteristics for an Objective. (This list is included as a participant handout in the Appendix).

1. Is it well defined? (specific)
2. Is it feasible? (attainable, do-able)
3. Is it realistic? (attainable given our resources, etc.)
4. Have we anticipated obstacles and ways to overcome the obstacles?
5. Will it see tangible results in a reasonable amount of time?  
(measurable, timed)
6. Is it already being done by some other group?
7. Will members be enthusiastic about this objective?
8. Will it involve many members and have broad support?
9. Will it lead to constructive action?
10. Will the results be commensurate with the effort expended?

**Examples:**

Goal	Current Objectives
To advocate that governments hold public education as a top priority	<ul style="list-style-type: none"><li>• The Education Standing Committee Chair will monitor the Board of Education and communicate with trustees on a regular basis, reporting items of interest to the club by newsletter article or presentation at a general meeting.</li></ul>
To provide support for women and girls to pursue higher education	<ul style="list-style-type: none"><li>• Expand value of scholarships to meet today's rising post-secondary education costs by an amount to be determined by the Scholarship Trust Fund and Awards committees for the 2005 awards.</li></ul>
To encourage and promote individual participation in our community	<ul style="list-style-type: none"><li>• Profile members who are involved in community activities in the newsletter.</li></ul>

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## 9. Develop Action Plan

The Action Plan is the “to-do” list of how to achieve an Objective. This step will likely be performed most efficiently by the Planning Committee, since it does not require a larger input base or consensus building.

For Example :

<b>Goal :</b> <b>EDUCATION</b>	To provide support for women and girls to pursue higher education				
<b>Objective</b>	Expand value of scholarships to meet today’s rising post-secondary education costs by an amount to be determined by the Scholarship Trust Fund and Awards committees for the 2005 awards.				
<b>Action Plan</b>	<b>Steps</b>	<b>Responsible</b>	<b>Resources</b>	<b>Timing</b>	<b>Output</b>
	Review current awards and determine amount available to increase value.	Scholarship Committee and Awards Committee		Autumn 2004 (ready for 2005 awards cycle)	Increased award values.
	Create Fundraising plan to supplement trust income.	Scholarship Committee		Summer 2004	

## 10. Review

For any plan to having enduring relevance, it must be subjected to periodic review and update. The reviews will most likely be the responsibility of the club Executive Committee, although some clubs may choose to maintain, or periodically reconvene a Planning Committee. At the most basic level, new Objectives and Action Plans must be identified as current ones are accomplished



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(preferably on an annual basis). The foundation statements of Purpose, Vision, Values and Goals should also be reviewed, although on a longer cycle, no longer than every five years.

The annual review cycle should include a review and discussion session with the general club membership some time in the spring (February to April). This will ensure that the plan remains relevant and supported by the club membership. Decision on the modification and addition of Objectives should be a joint effort between the incoming and outgoing Executive Committees in May or June. One approach is to have the outgoing executive evaluate their progress on the current objectives in May then, during June transition activities, discuss recommendations with the incoming committee, with the incoming committee then creating the new objectives for the year.

The foundations review should also include a similar consultation with the club membership and cross years of the Executive Committee.

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## APPENDIX

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## DEVELOPING A PURPOSE STATEMENT

To be completed individually, then discussed as a group

**EXERCISE :** Complete the following sentences. Discuss the results. Create a summarized statement of a club "Purpose".

1. **Our Current Purpose or Why we exist? What are we in business for?** Emphasize factors important to current and long-term success: Examples:

" \_\_\_\_\_ is committed to \_\_\_\_\_  
\_\_\_\_\_ by \_\_\_\_\_."  
\_\_\_\_\_

"We strive to have an impact on \_\_\_\_\_."

"We strive to provide services to \_\_\_\_\_  
\_\_\_\_\_ in a manner that \_\_\_\_\_."

Space for other thoughts: \_\_\_\_\_  
\_\_\_\_\_

2. **Our Profile** 3-5 years from now. Examples:

"In the future, we would like to be known for \_\_\_\_\_."  
\_\_\_\_\_

"We would like to maintain and advance our leadership in \_\_\_\_\_."  
\_\_\_\_\_

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## SITUATIONAL ANALYSIS

**EXERCISE:** Brainstorm as a group situations that impact the club in the following four ways (e.g. *Strength: diverse skills of members; weakness: lack of stable funding; opportunities: increasing media coverage of gender issues; obstacles: "competition" increasing number of women's organizations*). This may be done in small groups and then summarize in a larger discussion. Some participants may know this method as "SWOT" analysis (strengths, weaknesses, opportunities, threats).

### External/Outside/Around Us

OPPORTUNITIES	OBSTACLES

### Internal/Within Us

STRENGTHS	WEAKNESSES

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## NOTES FOR FOCUS GROUP LEADERS

For reference purposes leaders should note the following information about group participants: Name, approximate years with club, relevant club experiences (e.g. past president, or other executive position).

### Notes for Leaders:

- Before beginning with discussion of the topic, have all participants introduce themselves, and mention a little bit about their club experience (this will help understand the background for some of their comments).
- The purpose of the session may be described to the participants in the following ways: "We want to understand how you have experienced your involvement in \_\_\_\_\_ over the last few years. We also want to find out your thoughts on what you would like to see in \_\_\_\_\_ over the next several years and what would make it an effective aspect of our organization for you. "Our aim is to understand how the organization can best meet your needs and involve you."
- The Leader's primary role is as facilitator. Gather information from the participants rather than planting ideas
- Use prompting questions to keep the tone of conversation constructive rather than turning into a complaints session.
- Some prompting questions that might be used (substitute underlined phrases as needed):
  - What has been your experience with fundraising in the past?
  - How has this met your expectations? Why or why not?
  - How could it be improved? (*This is where we're looking for ideas & constructive feedback*)
  - What can you contribute? (*This is a prime opportunity to recruit volunteers, although we don't want anyone to feel pressured to do so.*)
  - What is your vision for fundraising activities in the next 2 years?
  - What ideas do you have to achieve this vision, i.e. what are the steps along the way?
  - What indicators would you look for as a measure of success in this area? (e.g. \$ raised, membership growth, etc)
  - What ideas do you have of new or different resources to help improve our fundraising efforts? E.g. community contacts, other success stories.

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- Try to keep the discussion focused on the topic at hand. If ideas or comments arise regarding another topic, note them (and tell the participant that it is being done, to make sure that they feel they are being listened to, but keep focus).
- Note any points that require specific follow up and how to best contact the participant. This would include any questions that cannot be answered at the time.

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## TRANSLATING VISION TO GOALS AND OBJECTIVES

Keep in mind these definitions:

**VISION:** A picture of where and what we want to be in the future. It reflects both our purpose and goals.

**GOALS:** The desired results we seek, expressed in general terms. They are long-term, open-ended, and never "finally" achieved. Getting close to these goals takes us towards our vision.

**OBJECTIVES:** Specific and concrete outcomes to reach in moving towards our goals. Milestones or markers in the never ending pursuit of goals

Objectives should meet the following criteria:

- Is it well defined? (specific)
- Is it feasible? (attainable, do-able)
- Is it realistic? (attainable given our resources, etc.)
- Have we anticipated obstacles and ways to overcome the obstacles?
- Will it see tangible results in a reasonable amount of time? (measurable, timed)
- Is it already being done by some other group?
- Will members be enthusiastic about this objective?
- Will it involve many members and have broad support?
- Will it lead to constructive action?
- Will the results be commensurate with the effort expended?