Strategic Planning Overview

Strategic planning is the process of identifying opportunities, developing a strategy and determining the actions to take to achieve group objectives.

WHY IS PLANNING IMPORTANT?

- **Helps to determine strategies that will have an impact on the issue**
- **Makes more efficient use of time and funding**
- **Helps determine WHAT? WHO? And WHEN?**
- **Helps avoid the "throwing spaghetti at the wall" mindset**
- **Keeps members engaged**

The action of planning also gets us thinking about what we will do, who will do it, and on what timeline.

Engaging in mindful planning helps us avoid doing random things because someone thinks it might be a good idea. It's the "throwing ideas out there and hoping something works" mentality that sinks so many well-meaningful people and groups. Mindful planning allows space for thoughtful strategy selection. Taking the time to understand what strategies have been proven to be effective or even evidence based can be helpful in the long run.

Well-structured strategic planning can be viewed as a road map to guide the organization towards achieving its established objectives. It gives the group a direction and shared focus which increases efficiency and allows for a better use of time and resources.

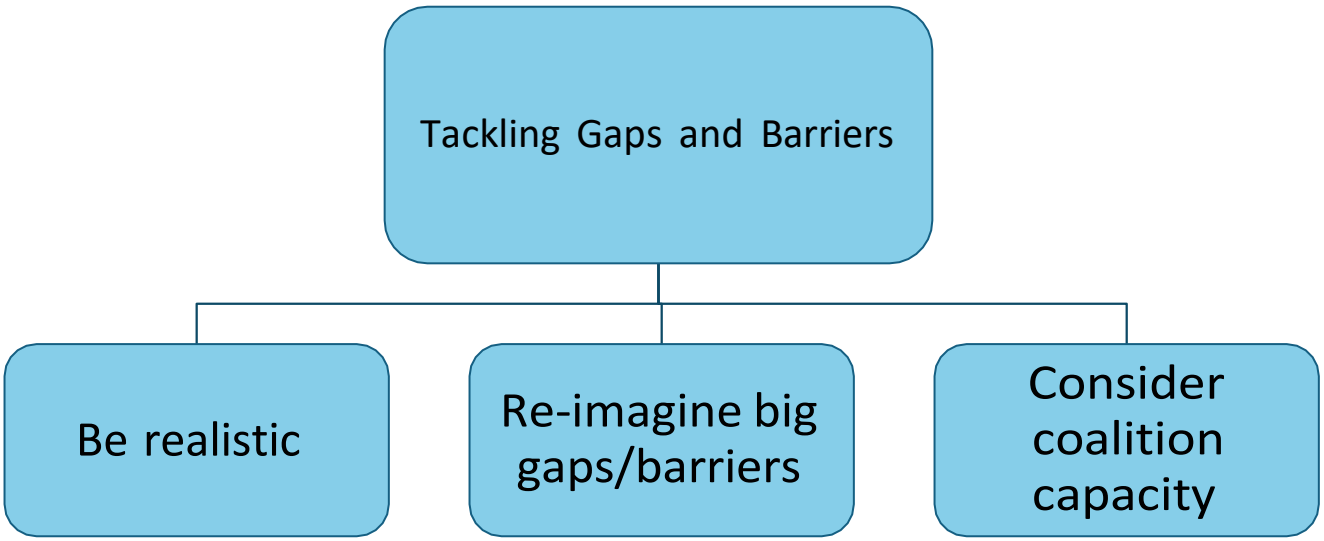
Finally, planning helps to keep your members engaged. It helps to divide up the tasks, show actionable items, and to make people feel like they are really assisting with creating change in their community.

THINGS TO CONSIDER WHEN PLANNING

Planning Is Best Done By A Group	Planning should NEVER be done by just one person in the group. It is recommended to form a planning committee to work on the strategic plan. This can be a small group who does the initial draft, and then takes it to the full group for approval.
Community Representation!	The planning committee should be representative of the community's demographics and of the full coalition. There should also include representation from any specific population that the group is working to serve. Remember, "Nothing about us without us."
Think Sustainability!	Sustainability should be at the forefront of the planning process. Consider ways to maximize resources by thinking in terms of long-term impact. This will improve the longevity of the group even if grant funds are no longer available.
Data, Data, Data!	Data should drive the planning process. Data identifies the gaps and areas to focus on when developing your strategic plan and identifies solutions and ways to move forward.
Misson, vision, values	Remember the mission, vision, and values of the group while determining your plan and next steps. Every potential strategy should be examined for how it meets the mission, vision, and values of your group… and if it doesn't, that strategy may need to be reconsidered.

DETERMINING YOUR FOCUS

When deciding your focus, think about what can realistically be accomplished in the determined timeframe.
A way to address this is by breaking down some of the bigger barriers into smaller, more attainable goals.
Remember to also consider your coalition's capacity. The coalition itself will likely not be able to provide solutions on their own. Community partnerships are vital to creating sustainable change.



DEVELOPING S.M.A.R.T. GOALS

Use data gathered during the assessment phase to identify gaps.
Critically examine the identified gaps and ask the question, "How can we impact this barrier?"
What change do you want to see?
Set a SMART goal/objective to identify the change you will work toward.

SMART GOALS

Specific - Be clear regarding what you will accomplish

Measurable – Make sure the goal is quantifiable

Achievable – Be ambitious…but also realistic

Relevant – The goal should align with your vision, mission, values?

Time-Bound – Set clear deadlines for progress and completion

LET'S PRACTICE!

Example: Your coalition membership is declining, and you have determined that sector representation has dropped from 9 to 6 community sectors represented in two years.

Let's set a SMART goal that might impact our overall goal of increasing membership.

Gap: Sector representation has dropped from 9 to 6 in two years

Goal: Increase sector representation at coalition meetings.	*Is this a SMART Goal?*
Goal: Increase sector representation from 6 to 9 by August 30, 2025.	*Is this a SMART Goal?*

Remember, a SMART goal must be specific, measurable, attainable, relevant to the gap, and time bond!

STRATEGIC PLANNING PROCESS SUMMARY

Goal	Set a SMART Goal/Objective
What?	Break that goal down into smaller strategies that will help move toward the goal
Who?	Determine who will be responsible for leading each strategy
By When?	Set a timeline for each strategy's completion

"Strategic planning will help you fully uncover your available options, set priorities for them, and define the methods to achieve them."

-Robert J. Mckain

Center for Community Engagement at Chestnut Health Systems

STATEWIDE ROSC

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