

Organizational Strategic Planning Woodland Owner Association Conference Sept. 22, 2007



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Penn State is committed to affirmative action, equal opportunity and the diversity of its workforce.



Aiming Activity

- In what direction (s) are your members headed?
- Where is your organization headed?
- Who sets the course for the direction?
- What leadership role do you want to play?
- How do you establish capacity building and consensus?



Options

- Talk about the future of the organization
 - Formally
 - Informally
- Go with the flow
 - Internal
 - External
- Document Information
 - Minutes
 - Committees
 - Individuals



Options

- Conduct a strategic planning process
- Includes
 - Discussion
 - Internal & external analysis
 - Documentation of data, findings and needed actions



What Is Strategic Planning?

- Process to guide an organization's future and determine:
 - Where is it going over a period of time
 - How it will get there
 - How it will know if it got there



Strategic Planning

- Planning versus reacting
- Brings members together and increases members' involvement
- Brings stakeholders together
- Creates dialog
- Examines influences: trends & data



Strategic Planning

- Involves an organizational assessment
- Allows analysis
- Helps identify & prioritize important goals
- Documents needed actions
- Motivates by knowing direction and methods to get there
- Results in a strategic plan document



Strategic Plan Benefits

- Increases knowledge base
- Produces a common vision
- Focuses resources on key priorities
- Provides milestones
- Can increase collaboration



Strategic Plan Benefits

- Helps ensure common goals
- Anticipates future environment
- Better adjustment for changes
- Funding issues/opportunities



Strategic Planning Considerations

- Why do you want to do it?
- What do you want out of it?
- Are you willing to commit the time and resources?
- Are all applicable parties supportive?



Strategic Planning Steps

- Secure support and determine status
 - Decision makers and support staff on board
 - Willingness to communicate and work together
 - Outside stakeholder support



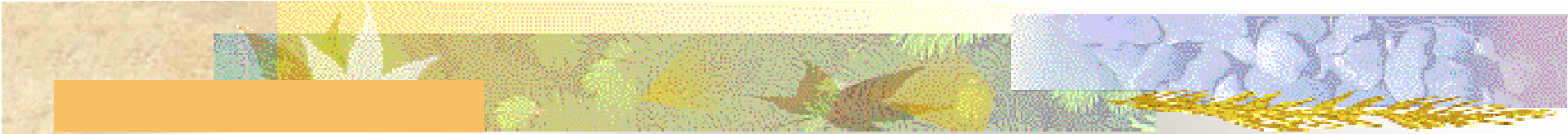
Strategic Planning Steps

- Formally commit to the planning process
 - Board action
 - Staff support
 - Set aside of resources (time, expenses, materials)



Strategic Planning Steps

- Create the Planning Team
 - Determine team composition
 - Existing committee versus new
 - Leader
 - Plan Writer
 - Facilitator



Examples of Issues for Planning Team

- Who are the stakeholders
- Timeframes
- Number of Meetings, Locations, Dates, Format
 - Retreat versus multiple meeting format
 - Delegate post retreat/meeting work
- Determine roles & responsibilities
 - i.e. Draft of Vision Mission Statement
 - Detail of planning exercises
- Detail of work
- Data needs



Strategic Planning Steps

- Organizational assessment
 - What do we do now?
 - Activities
 - Who are the beneficiaries of our services?
 - Results of our work
 - Organizational structure
 - Board
 - Committees
 - Support Staff



Organizational Influences

- Data compilation & analysis
- Determination of stakeholders
- Survey data
- SWOT analysis
 - Internal: Strengths, Weaknesses,
 - External: Opportunities & Threats



Strategic Planning Steps

- Mission & Vision Statements
- Mission
 - Who do we serve?
 - Why do we exist?
 - How do we intent to operate?
 - What values drive our organization?



Questions for Mission Statement

- What does your organization seek to contribute to the community and/or its members? What are your goals?
- How does your organization seek to achieve these goals? What services does your organization provide?



Questions for Mission Statement

- Who are your organization's primary clients? Are these the same it should be serving?
- What do you value about how your organization accomplishes tasks? What standards do you think are important about how your organization does what it does?



Vision Statement

■ Vision

- Clarifies the organizations direction
- Answers the questions:
 - What is our preferred future?
 - What would things be like if we follow and achieve our mission?



Strategic Planning Steps

- Determine Goals
 - Specific accomplishments that are to be achieved
 - Prioritize goals
- Example: To strengthen our financial base.



Strategic Planning Steps

■ Objectives

- Are quantifiable and are written in terms of outcomes expected
 - Have an end time when they can be measured
 - Should be realistic
 - Should begin with action verbs
- Example: Acquire at least three grants from private foundations within one year.



Action Steps

- Action Steps

- Says how the goal and objective will be achieved

- Method, process & action

- Who will do it and by when

- Can include costs

- Example: The fund raising committee will compile and prioritize a list of prospective donors by September 15th.



Sample Retreat Agenda

- Welcome & Overview
- Review of Completed Work
- Environmental Scan
- SWOT
- Goal Setting & Prioritization
- Objectives & Action Plan
- Next Steps



Activity

- As a group, decide upon a desirable goal for a Woodland Owners Association (list on worksheet)
- Create and document an objective for that goal
- Create and document at least one action step
- Reconvene and share results



Strategic Planning Steps

- After the “work is done”
- Implement the plan
 - Don’t put it on a shelf and feel good about it
- Monitor the plan and actions
 - Determine methods for reporting
 - Update and revise when applicable



Summary

- Strategic planning:
 - Takes commitment
 - Involves teamwork
 - Has benefits
 - Can be tailored for your needs
 - Requires implementation and monitoring to be successful



Penn State Cooperative Extension

- Potential PSU Extension Role
 - Planning Team
 - Facilitation
 - Resources
 - Choosing Our Direction Workbooks
 - Worksheets, Agenda, Data
- Direction & Guidance



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