

A Straightforward Approach to Strategic Planning

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An effective strategic plan for an organization is most effective when it is as simple as possible. While it may seem important to make the plan reflect the gravity of the process or the significance of its content, we always need to resist any temptation to “pad” the plan with non-essential content. As Leonardo da Vinci said, “Simplicity is the ultimate sophistication.”

Organizations also need to resist the imposition of a “process of the month” approach. No process is perfect but nearly every rational process used for strategic planning works. Whatever process your organization selects needs to be adapted to fit the situation, agreed upon, and followed. It requires some discipline.

Strategic planning is a top-down process. It presumes you will make the major decisions first and each decision or goal that is selected below that must be able to be tied to a higher level decision or goal. When you find yourself doing something that does not seem to relate to a strategic objective of the organization, either stop it or conduct a dialogue about whether you need to add to the strategic objectives.

A good strategic plan should consist of the following basic components, in order of their importance:

A. A clear mission statement that defines why the organization exists and what it intends to do.

B. A clear vision statement that provides a definition of what "success" looks like at some point in the future. My preference is a concise narrative description that tells a story of what our organization looks like, what it feels like to stakeholders, how it is perceived by the community, what its core competencies are, and what it has accomplished. An effective vision statement has three basic criteria:

1. it is clear and everyone can see what "success" looks like;
2. it is shared in that the leadership of the organization and its stakeholders have buy-in and support on the vision; and
3. it is compelling in that stakeholders are motivated and willing to do what needs to be done to make it happen.

C. A set of clearly-defined core values that indicate the culture of the organization’s community and drive the decisions that are made. For example, if “transparency” is determined to be a core value, what do we mean when we say transparency and what behaviors of the organization assure that we are living up to our core values.

Frequently, this is an overlooked area of strategic planning but a strong, consistent culture that is lived out is one of the single most important predictors of success.

D. A series of specific goals for each general operations area. For example - these might be Education, Advocacy, Membership, Communication, Governance, Administration, etc. - whatever the group decides that structure should be.

E. An implementation strategy that includes general assignments of responsibility, completion dates, metrics that might be created, and a reporting system.

My basic philosophy is that strategic planning is the engagement in an ongoing process of governing and managing an organization. It is not a "manufacturing event". The strategic plan is merely a tool that helps the organization determine what it needs to do to be most effective (and strategic). It should be both timely and timeless as opposed to long-range. It is both the map and the journey. It provides a compass. (*I'm nearly out of journey metaphors.*) Each Board and committee meeting should create agendas based upon the strategic plan, since that defines that core work of the organization.



At least annually, the Board needs to get together and engage in a dialogue that consists of *looking back* (how did we do last year in meeting our goals?), *looking around* (what has changed in our community since we developed our strategies?), and *looking ahead* (what do we need to do next?).

It is being more intentional and teleological in its approach. The process is to "Think – Plan – Act" rather than the "ready, fire, aim" approach organizations too often take. It has been my experience that, unless the group is willing to commit to that type of approach, the strategic planning process will likely struggle.