



## Strategic Planning Guide

### What is Strategic Planning?

Strategic planning is **a management tool meant to help an organization** do a better job – **to focus its energy**, to ensure that its members are working toward the same goals and to assess and adjust the chapter's direction in response to a changing environment. The process involves intentionally setting goals and developing an approach to achieve these goals.

Strategic planning offers an approach to **identify those goals, decisions and actions with the highest priority** in order **to meet** organizational **goals and objectives** and ultimately, **gaining or sustaining operational success**.

The two most critical aspects of a successful and manageable strategic plan are strategic thinking and strategic management. Simply put, **strategic thinking** means asking:

**“Are we doing things the right way?”**

**“Do we have a thorough understanding of the environment, the community and our members – the forces which affect and/or impede the fulfillment of our purpose?”**

**“Does our leadership team have the creativity and forethought to develop effective responses to those forces?”**

**Strategic management is the application of strategic thinking** to the job of leading an organization; having the ability

to see the 'big picture' and the willingness to adapt to changing circumstances in order to continuously offering services that appeal to the general membership at all times.

It is often believed that **strategic planning** is expected to predict the future for an organization, albeit falsely so. The process **involves anticipating the future environment but all decisions are made in the present**. The strategic plan is meant to be a living document so it is expected that deviations from the plan will be made to meet changes in the environment – be that changing membership needs, new technologies or shifts in the industry.

### Benefits of Strategic Planning

Strategic planning can offer a clear focus, producing efficiency and effectiveness; clearly defines the purpose of the chapter in order to establish realistic goals and objectives; financial responsibility and efficiency as chapter resources are focused on key priorities; provides a base from which progress can be measured and quantified; and offers a mechanism to identify potential issues before they become major problems.

### When should Strategic Planning be done?

For the purpose of REIC chapters, strategic planning might be carried out on an annual basis but only certain aspects of the plan (such as objectives, timelines, responsibilities and budgets) may need annual updates. It is recommended that the plan is referred to at each board meeting to ensure that activities are carried out in line with the objectives and goals as stated in the current strategic plan.

## **STRATEGIC PLANNING BASIC TERMS**

### **RESULTS**

**Goals** are specific accomplishments that must be completed in total, or in some combination, in order to achieve some larger, overall result, such as the chapter's mission.

**When setting goals, make sure they are:**

#### **Specific**

Instead of setting a goal for the chapter leadership team to work harder, outline specific goals such as host more events, strengthen involvement by chapter members, fill open board positions, communicate better with members, etc...

#### **Measurable**

Become even more specific by stating the number of events to host, how to involve members, the number of seats to fill on the board within a specific timeframe and how to improve communications.

#### **Realistic**

Make sure that the goals, objectives and timelines are realistic based on available resources.

#### **Objectives**

Are usually milestones the chapter must reach along the way when implementing strategies set in place as a way to achieve the plan's goals.

### **METHODS USED TO ACHIEVE RESULTS**

#### **Strategies or Activities**

Are the methods or processes required in total, or in some combination, to achieve the goals.

#### **Tasks**

Are assigned to various people involved in the planning and /or implementation process. For small plans, the tasks and activities are often very similar, if not the same.

#### **Resources & Budgets**

Include the people, materials, technologies and funding required for a successful implementation of the strategic plan.

## **TYPICAL PHASES of STRATEGIC PLANNING**

### **Involve the right people in the planning process**

When planning, get input from everyone who will be responsible for one or more aspects of the plan (planning, implementation, review and/or authorization), along with representatives from groups who will be affected by the plan (chapter members and REIC) to ensure that the plan falls in line with the needs on both the local and national levels.

### **Reference overall singular purpose (mission) or desired result**

The chapter mission should include, to some extent, the framework policies set by REIC – mission, goals and objectives – such as the corporate messaging and branding campaign in order to increase awareness and strengthen the brand in the industry and with consumers.

### **Conduct an environmental scan and analyze the situation**

Where is your chapter today? What are the characteristics of your chapter and the environment in which it operates? Conduct a SWOT analysis. (**SWOT – Strengths, Weaknesses, Opportunities, Threats**). It is imperative that the strategic planning team (most often the chapter leadership team or a section thereof) maintain an unbiased position while reviewing factors such as the successes and failures of the chapter's past events, marketing and communications campaigns as well as the Board's overall effectiveness.

### **Establish goals**

What do you want to accomplish? What will be the impact on your chapter if your strategic plan is successful?

### **Establish strategies to reach goals and objectives in order to measure progress**

The strategies used are often dependant on the availability of funds (budget) as well as time-management and practicality issues, especially within not-for-profit organizations where the planners are volunteers, such as on a chapter Board.

### **Set timelines and responsibilities for each objective**

### **Write and communicate the official strategic plan**

The Strategic Plan is an official document outlining in detail the goals and implementation processes which will be utilized in order to meet said goals.

### **Acknowledge completion and celebrate success**

#### **In Summation**

The point of strategic planning is to develop long-term strategies that use the chapter's strengths and take advantage of opportunities so that the chapter can achieve its goals. Based upon the strategies, short-term operational plans are developed, consisting of measurable, time-limited objectives and the activities necessary to achieve them. The Action

Plan and Budget required for the REIC Documentation Submission Process each year encompasses strategic planning processes on a much less complex platform.

A key element of outcome-based planning is the identification of performance measures or indicators of success (benchmarks or standards to measure progress).

#### **Benchmark samples**

Event feedback reports, chapter board self-evaluations, membership retention and volunteer and event interest and attendance