

Strategic Planning in an Unstable Implementation Environment

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Abstract

This presentation will focus on how Strategic Planning is a management tool to assist an organization or coalition in doing a more effective job of focusing its energy; to ensure that members are working toward the same goals and to assess and adjust its direction in response to an ever-changing environment. Strategic planning provides the master plan an organization uses to achieve its aims. It charts the direction and goals of the entire organization and all aspects of its operation. In short: Strategic Planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the intermediate future.

Learning Objectives:

1. Participants will be able to describe the importance needs of students, parents and stakeholders served by the educational organization as a primary focus of setting goals in a strategic planning process.
2. Participants will be able to identify and distinguish between internal administrative and programmatic strengths and weaknesses of the organization or coalition.
3. Participants will be able to describe the key components of two tools that assist organizations and coalitions in scanning the relevant external environment to find emerging opportunities and threats for an organization.
4. Participants will be able to write a strategic objective that is specific, measurable, attainable, realistic, and time-referenced (SMART).

About the presenter

Dr. Khalifah Ramadan's educational background includes M. Ed. and Ed. D. degrees in Cooperative Learning and Interdisciplinary Curricula Design and Development from North Carolina State University. Dr. Ramadan has served as a Consultant Trainer, Peer Review Panel Chairman and Peer Reviewer with the US Government Departments of Justice, Education, Health and Human Services, and Housing and Urban Development and other public and private entities. Dr. Ramadan has traveled to over 40 states within the USA providing training and technical assistance in the areas of program evaluation, strategic planning, organizational/systems development, grant writing, fiscal management, board development and multi-cultural/diversity issues. Currently Dr Ramadan serves as the National Training Coordinator for The Muslim Alliance in North America (MANA)

Purpose

Nonprofit organizations must have a grounded starting point to effectively accomplish their missions. A strategic plan is a vital tool and an important process that helps an organization reach its goals and achieve success.

The purpose of this paper is to provide learners with the fundamentals of building a successful strategic plan for operating a nonprofit support organization for. This manual presents information for preparing a strategic plan for people with varying levels of experience in strategic planning.

This manual offers a framework for strategic planning with suggestions developed specifically for nonprofit organizations dedicated to AIDS advocacy and prevention. Those who already have experience with strategic planning will find this a useful refresher and “source.”

UNIT 1:

Understanding Strategic Planning

I. A Definition of Strategic Planning

Strategic planning is a management tool for several key purposes: to help an organization do a better job, to focus its energy, to ensure that members are working toward the same goals and to assess and adjust its direction in response to an ever-changing environment. Strategic planning provides the master plan an organization uses to achieve its aims. It charts the direction and goals of the entire organization and all aspects of its operation. In short: *Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future.* (Bryson, 1988.)

In addition, strategic planning does the following:

- Shares an organization’s vision with a large internal and external audience.
- Clarifies and makes the organization’s mission specific.
- Strategic involves choosing how to respond organization’s environment.
- Must respond to dynamic and sometimes even hostile environments.
- Identifies clients, consumers and stakeholders served by the organization.
- Identifies distinctive strengths and weaknesses of the organization.
- Scans the relevant environment to find emerging opportunities and threats for an organization.
- Involves the key people inside and outside the organization in the planning process.
- The process is about planning because it involves intentionally setting goals and
- Developing an approach to achieving those goals.
- Creates a context for making choices about possible future directions.
- The process is disciplined in that it calls for a certain pattern to keep it focused and productive.
- These choices are fundamental decisions and actions that must be made to reach a desired future.
- The plan ultimately is no more (and no less) than a set of decisions about what to do, why to do it, and how to do it.

The strategic planning process can be complex and challenging, but by using the basic ideas outlined above, you can develop and execute a successful strategic plan.

STAKEHOLDER

Anyone who cares, or should care, about the organization — anyone who has a “stake” in the success or failure of its mission — is a stakeholder. This encompasses those who must implement the strategic plan, those who benefit from its implementation and those who could significantly help or hinder its implementation: board members, staff (part- and full-time, salaried and volunteer, current and previous), funders (existing, potential), clients (existing, past, (potential), community leaders, competitors, potential collaborators, and other agencies in parallel or related fields.

Strategic Planning and Long-Range Planning

Although many use the terms strategic planning and long-range planning interchangeably, the terms differ in their emphasis on the “assumed” environment. Long-range planning is generally considered to assume current knowledge about future conditions. It looks to ensure the plan’s exact results over the duration of its implementation. Strategic planning, however, assumes that your organization must be responsive to a dynamic, changing environment, which may call for changes in the future. Strategic

planning, then, stresses the importance of making decisions that will ensure your organization's ability to successfully respond to changes in the environment.

Strategic Thinking and Strategic Management

Strategic planning is only useful if it supports strategic thinking and leads to strategic management and, even more importantly, execution. Strategic thinking and subsequent management must result in action. Dr. Jagdish Sheth, a respected authority on marketing and strategic planning, provides the following framework for understanding strategic management. He says that it means continually asking the question "Are we doing the right thing?" It entails both attention to the "big picture" and the willingness to adapt to changing circumstances and consists of the following three elements:

- .Formulation of the organization's future mission in light of changing external factors such as regulation, competition, technology and customers.
- Development of a competitive strategy to achieve the mission.
- Creation of an organizational structure which will deploy resources to successfully carry out its competitive strategy. (Sheth,1985.)

Strategic management is adaptive and keeps an organization relevant. In these dynamic times, this approach is more likely to succeed than assuming everything is fine just the way that it is.

What Strategic Planning Is *Not*

Strategic planning is about fundamental decisions and actions, but it does not attempt to make long-range future decisions (Steiner, 1979). Strategic planning involves anticipating the future environment, but the decisions are made in the present. This means that over time, your organization must stay abreast of changes in order to make the best decisions it can at any given point — it must manage, as well as plan, strategically. Strategic planning has also been described as a tool — but it is not a substitute for the exercise of judgment by leadership. Ultimately, the leaders of any enterprise need to sit back and ask themselves "What are the most important issues we should respond to?" and "How shall we respond?" And they must have answers.

LONG-RANGE PLANNING

Long-range planning is generally considered to assume current knowledge about future conditions. It looks to ensure the strategic plan's results over the duration of its implementation.

Strategic Planning

Finally, strategic planning, though disciplined in many respects, does not typically flow smoothly from one step to the next. It is a creative process, and the fresh insight arrived at today might very well cause you to alter the decision made yesterday. Inevitably, the process moves back and forth several times before arriving at the final set of decisions. So, no one should be surprised if the process feels less like a comfortable trip on a commuter train and more like a ride on a roller coaster. But remember, even roller coaster cars arrive at their destination!

The process of strategic planning can lead to:

- Creating a forum for understanding why the organization exists and the value that should influence decisions.
- Defining a shared vision of the organization's future that can guide the current allocation of scarce resources — which is not to predict the future, but to define the organization's preferred future and establish a perspective that will guide current decisions.
- Fostering successful communication and building teamwork among the board of directors, staff and external constituencies.

- Laying the groundwork for meaningful change by stimulating forward thinking and focusing attention on what is really important to the organization's long-term success.
- Participation in the process makes for a better-informed staff and board and empowers them to be more effective leaders, managers and decision makers. And they end up with a planning document that they can use to effectively manage the organization. Between the planning process and the realization of a final written plan, a number of tangible benefits can emerge:
- An explicit understanding of the organization's purpose, mission and values among staff, board and external constituents, with that understanding supporting an increased level of commitment to the organization and its goals.
- A framework that guides and supports the governance of the organization and orients board and staff toward more strategic thinking and strategic management.
- A means of monitoring achievements and measuring results.
- A blueprint for action.
- Improved services for students and the community.
- Information that can be used to "market" your organization to the public and potential funders.

II. The Strategic Planning Process

There are five fundamental steps in the planning process. These steps are a recommendation, but they are not the only recipe for cooking up a strategic plan. Thoughtful and creative planners will add spice to the mix or elegance to the presentation to develop a strategic plan that best suits their organization.

Step 1: Getting Ready

To prepare for strategic planning, your organization must first assess if it's ready. While a number of issues must be addressed in assessing readiness, that determination essentially comes down to whether your organization's leaders are truly committed to the effort and whether they are able to devote the necessary attention to the "big picture." For example, when a funding crisis looms, or the founder is about to depart, or the environment is so turbulent that everyone is putting out fires, it may not make sense to take time out for a strategic planning effort. Once you determine that your organization is indeed ready to begin strategic planning, you must then do four things to pave the way for an organized process:

- Identify the specific issues or choices that the planning process should address.
- Clarify roles (who does what in the process).
- Create a planning committee to develop an organizational profile.
- Identify the information that must be collected to help make sound decisions.

The product developed at the end of Step 1 is called a work plan. (Depending on the size of your organization, this part of the process can involve many key individuals. It can be shortened, however, if your organization has only a handful of staff that will need to provide input.)

Step 2: Developing the Vision and Mission Statements

A mission statement is like an introductory paragraph: It must communicate the essence of your organization. An organization's ability to articulate this indicates its focus and purposefulness. A mission statement typically describes an organization in terms of:

- Purpose: Why the organization exists and what it seeks to accomplish.
- Business: The main method or activity through which the organization tries to fulfill this purpose.
- Values: The principles or belief system that guides an organization's members as they pursue the organization's purpose.

Whereas the mission statement summarizes the what, how and why of an organization's work, a vision statement presents an image of what success will "look like." For example the mission statement and vision statement of one organization are as follows:

Mission: The mission of the Support Centers of America is to increase the effectiveness of the nonprofit sector by providing management consulting, training and research.

Vision: Our guiding principles are to promote client independence, expand cultural proficiency, collaborate with others, ensure our own competence and act as one organization.

From these statements, we can see that the group envisions an ever-increasing global movement to restore and revitalize the quality of life in local communities. The Support Centers of America wants to be a recognized contributor and leader in that movement. With mission and vision statements in hand, this organization has taken an important step toward creating a shared, coherent idea of what it is strategically planning for.

The products developed at the end of Step 2 are a draft mission statement and a draft vision statement. (This step can be very complex for a larger organization with multiple stakeholders. Smaller organizations will be able to come to agreement on a mission more readily.)

Step 3: Environmental Assessment

Once your organization has clarified why it exists and what it does, it must take a clear-eyed look at its current situation. Remember that part of strategic planning, thinking and management is an awareness of available resources and an eye to the future environment so that your organization can successfully respond to change. This step is about gathering up-to-date information about how your organization will highlight the critical issues that your organization faces and that its strategic plan must address. These could include a variety of primary concerns, such as funding, new program opportunities, changing regulations or changing needs in the client population; the point is to choose the most important issues to address. The products that result from Step 3 are a "database" of concrete information that can be used to make decisions and a list of critical issues that demand a response from the organization — the most important issues that the organization needs to address.

VISION STATEMENT

A descriptive sentence that presents a broad image of what success will "look like" for a nonprofit organization.

MISSION STATEMENT

A mission statement reflects the essence of an organization's intent and tells when, where and how it will fulfill its purpose and attain the vision.

ENVIRONMENTAL ASSESSMENT

The process of gathering and analyzing the information needed to make an evaluation of your organization in its environment. The environmental assessment includes the following activities:

- Collecting internal and external stakeholders' perceptions about the organization.
- Evaluating programs' impact on clients.
- Evaluating programs through a cost/ benefit analysis.
- Defining previous implied strategies.
- Analyzing programs through a competitive analysis.

Step 4: Developing Strategies, Goals and Objectives

Once you have affirmed your organization's mission and identified its critical issues, it is time to figure out what to do about them: the broad approaches to be taken (strategies) and the general and specific results to be sought (the goals and objectives). Strategies, goals and objectives may come from individual inspiration, group discussion or formal decision-making techniques — but in the end the leadership agrees on how to address the critical issues. This can take considerable time and flexibility: Discussions at this stage frequently require additional information or a reevaluation of conclusions reached during the environmental assessment. It is even possible that new insights will emerge that change the thrust of the mission statement. To create the best possible plan it is important that planners not be afraid of going back to an earlier step in the process to take advantage of newly available information.

The product of Step 4 is an outline of the organization's strategic directions — the general strategies, long-range goals and specific objectives of its response to critical issues.

Step 5: Completing the Written Plan

You've articulated the mission, identified the critical issues, and agreed upon the strategies — so Step 5 essentially involves putting all that down on paper. Usually one member of the planning committee, the executive director, or even a planning consultant can draft a final plan document and then submit it for review by all key decision makers (usually the board and top staff). This is also the time to consult with top staff to determine how the document will be translated into operating plans (the detailed action plans for accomplishing the goals proposed by the strategic plan). This important action ensures that the plan addresses key questions about priorities and directions in sufficient detail to serve as a guide. Revisions should not be dragged out for months, but action should be taken to answer any important questions that are raised. It would certainly be a mistake to ignore serious disagreement at this step just to wrap up the process more quickly.

The end result will be a concise description of where the organization is going, how it should get there and why it needs to go that way — ideas that are widely supported by the organization's staff and board.

The product of Step 5 is the Strategic Plan.

STRATEGY

A strategy is a coordinated approach or direction adopted by an organization in response to a critical issue and/or goal.

GOALS

Goals are described in a broad outcome statement that guides a program or management function.

OBJECTIVE

An objective is a precise, measurable, time phased result that supports the achievement of a goal

Planning

Step 1: Getting ready; initiating the planning process Results in a work plan.

Step 2: Developing a mission and vision Results in a mission statement.

Step 3: Conducting an environmental assessment - Results in a resource database of information.

Step 4: Developing strategies, goals and objectives - Results in an outline of strategic directions.

Step 5: Writing the strategic plan - Results in a strategic plan.

UNIT 2:

Initiating The Planning Process

Strategic planning helps your organization become vibrant and capable of evolving. In the book *The Living Company, Habits for Survival in a Turbulent Business Environment*, Arie De Geus writes that organizations are alive, and just like people, they need to be adaptable to their changing environment in order to be successful long term. The challenge of combating AIDS is beyond a doubt such a long-term challenge. Strategic planning is a good idea, but it is only worthwhile in practice if the organization is ready and the right people in the organization believe in it and are committed to achieving it. (A good definition for commitment, by the way, is unwavering perseverance and emotionally impelled direction.)

The overview provided in Unit 1 outlines requirements for successful planning, as well as potential pitfalls to avoid. Most important is the requirement of a strong commitment to the planning process by the executive director and board leadership. Top leadership must spend significant time and energy on the process or it will never get off the ground. In other words, regardless of how much an organization “needs” to do strategic planning, a program manager or board member will not be able to initiate a planning process alone, or see that it happens successfully. This does not mean that a visionary on the staff or board has no opportunity to initiate a strategic planning process. One person can be the catalyst to start the process.

Such an individual must, however, actively recruit support from leaders by identifying the potential benefits to the organization and helping key stakeholders see the need for planning. For example: Is the staff confused about how their programs relate to each other? Does the board shy away from seeking community support for the organization? Is it unclear what the organization has accomplished and how to measure the success of its efforts? If the answer to these kinds of questions is “yes,” then a compelling case can be made to management for doing strategic planning.

This important up-front homework is essential because it will pay off down the line with board and staff commitment to the process. The strategic planning process is part of a board-staff partnership. The reason both groups need to be involved is that strategic planning is at the intersection of governance (the board’s role) and management (the staff’s role). Whoever initiates the strategic planning process must recognize that its success lies in getting involvement from all parts of the organization. The executive director and board president need to assess the organization’s readiness and be clear about what they would like the planning process to accomplish. If it makes sense to go forward, then proceed by forming a planning committee.

I. Getting Ready

Perhaps the best way to start the process of strategic planning is by establishing some context for the effort — if your organization is considering doing such planning, there are probably some underlying reasons and hoped-for outcomes. This is not a formal evaluation, but simply a way to “get a handle on” the concerns and expectations that paint a picture of this effort at the outset.

Strategic Planning Readiness Criteria

- .Commitment and support from top leadership, especially the executive director and board president, to see the project through to the end.
- Clear roles and expectations for all participants in the planning process, including clarity as to who will contribute input to the plan and who will be the decision makers.
- Access to relevant information for assessing the organization (sufficient market research) and willingness to recognize and respond to the organization’s internal and external environment (strengths, weaknesses, opportunities and threats).
- At least one strategic thinker and at least one realist, willingness to be inclusive and encourage broad participation so that people feel ownership of and energized by the process.
- An adequate commitment of organizational resources to complete the planning process as designed, for example, staff time, board time and dollars to spend on the process (market research, consultants).

- A board and staff that understand the purpose of planning, realize what it is and is not able to accomplish, and have reached consensus about the desired outcomes of the planning process.
- A true commitment to assessing current programs and to meeting current and future client needs.
- A willingness to question the status quo and to look at new ways of doing and evaluating things.
- Good working relationships and an ability to work through conflicts among key players.

A. Planning Process Considerations

As with any major effort, a strategic planning process has its proper time and place in the life of an organization. Certain conditions and criteria must exist (and others must not) if strategic planning is to be a creative, collaborative, successful endeavor — so it is important to be honest when analyzing your organization's readiness to plan.

The planning readiness criteria outlined above are the ideal elements your organization should have in place before committing to a strategic planning process. But when considering such an effort, the pitfalls to be avoided are equally important. If you recognize your organization in any of the symptoms below, step back and rethink the feasibility of a strategic planning endeavor at this point in time. If many of the pitfalls presented below are present, then an in-depth strategic planning process may not be appropriate at this time. Even if your organization is halfway through the planning process before realizing that it isn't really ready to plan, you should stop right there and address the barriers to strategic planning before continuing with the process.

Strategic Planning Pitfalls

- Too much formality or rigidity in the planning process so that it lacks simplicity and restrains creativity.
- Top management that assumes that strategic planning is something separate from the entire management process.
- Top management that assumes that it can completely delegate the planning function to a planner.
- Top management so engrossed in current problems (such as a financial crisis or other extreme circumstance) that it has neither the time nor the leeway to look far enough ahead to plan for the future.
- Top management's tendency to reject the decisions made during the planning process in favor of its own intuitive decisions.
- Failure to involve line staff and members of the board in the planning process.
- Failure of top management to include department and division heads in developing plans for their departments.
- Failure to articulate constraints and non-negotiables up front.
- Failure to create an organizational climate that is receptive to planning and change.

B. Prior Experience

In addition to assessing current circumstances, it is useful to assess past efforts at planning and apply lessons learned. If an organization's previous planning processes were successful, then it will want to try to duplicate that success by using similar processes this time around. But if prior planning efforts have not worked well, or the plans that resulted from prior efforts were not followed, then you need to spend some time figuring out why this is so and what changes might benefit future planning efforts. If the management team of your organization has been in place for a few years, there should be a number of staff around who can play the role of historian to give this effort more credibility.

C. Participation in the Planning Process

Strategic planning should be an inclusive effort that engages key stakeholders at appropriate stages. Who are stakeholders? Anyone who cares, or should care, about the organization and anyone who has a “stake” in the success or failure of its mission is a stakeholder. This encompasses those who must implement the strategic plan, those who benefit from its implementation and those who could significantly help or hinder its implementation, such as board members, staff (part-time and full-time, salaried and volunteer, current and previous), funders (existing, potential), clients (existing, past, potential), community leaders, competitors, potential collaborators and other agencies in parallel or related fields. Part of the thought and creativity of the strategic planning process is identifying those individuals and groups that traditionally might not be regarded as “key” stakeholders, but who might contribute unique and valuable perspectives. It is important to include this range of participants because a truly inclusive process achieves the following:

- Helps build internal and external enthusiasm for and commitment to the organization and its strategies — those who feel they have contributed to the planning process then feel invested in it and are more likely to take ownership of the organization’s goals and efforts
- Adds objectivity to the process — “outsiders” can identify jargon or ask critical questions about issues that “insiders” might assume are common knowledge or simply take for granted.
- Develops foundations for future working relationships.
- Establishes a continual information exchange among staff, management, clients and other key stakeholders.
- Ensures an adequate depth and breadth of data from which to make informed decisions.

D. Stakeholders’ Roles in Planning

Determining how to include all these stakeholders can prove even more challenging than identifying who they are, as there are many different kinds and levels of participation in the strategic planning process:

- Leadership: Taking the initiative to see that decisions get made and things get done.
- Facilitation: Paying attention to process rather than content (a role played, for example, by an outside consultant or neutral participant).
- Input: Providing information and opinions.
- Decision-making: Using that information and those opinions to establish strategies and goals.

It is especially important to delineate between those stakeholders who provide input and those who make decisions. Being asked for an opinion is not the same as having a final say in related decisions, but stakeholders sometimes lose sight of that distinction. It is the responsibility of those who make the decisions to build a framework and process for letting participants know their roles and what will be done with their input and opinions. The nature of stakeholders’ participation will depend on any number of factors — size, “culture” and management style, range of constituents and breadth of services. Below are some general descriptions of specific stakeholders’ roles in the strategic planning process.

1. Executive Director. The executive director is usually the chief planner and prime “mover” of the plan through the entire process. He or she works closely with the chair of the planning committee and often serves as the prime liaison between the staff and the planning committee. Sometimes the executive director also writes the strategic plan, but may delegate that responsibility to someone else. Finally, the executive director plays a crucial role in that he or she is ultimately responsible for the implementation of the plan.
2. Board of Directors. In its governance capacity, one of the board’s primary responsibilities is planning — ensuring a good planning process is in place, contributing a visionary, big-picture perspective to the process and approving the final plan. The board should provide input for the mission, vision, values and environmental assessment aspects of the plan. The board might also be involved in strategy discussions, setting long-term program and administrative priorities and setting goals for itself.

3. Staff. Paid and volunteer staffs have programmatic expertise and familiarity with the field and clients, which are vital to shaping a relevant and workable strategic plan. Their involvement not only ensures “buy-in” to the organizational goals and strategies, but is the link between the vision described in the plan and the realization of that vision on a day-to-day basis. Some staff might also be asked to collect data (market research) and evaluate programs. Program managers should have input into setting long-term program objectives and should assist in developing operational plans. Ideally, staff should be represented on the planning committee.
4. Students. The sole reason for most nonprofits’ existence is the betterment of society, whether that means enriching cultural life, feeding the hungry or increasing the quality of life of youth. In a planning process then, it is critical to evaluate what kind of job the organization is and should be doing in this regard. Directly involving past and present clients in the planning process and soliciting accounts of their unique first-hand experience with your organization is one of the best ways to gain insight into its performance and obtain guidance for providing services in the future. For these reasons, some organizations include client representatives on the planning committee.
5. Funders. Past, current and potential funders provide another valuable perspective on client needs and how others in the community are either meeting or failing to meet those needs. They may be able to shed some light on the funder’s inclination to fund a specific new program. Likewise, discussions with funders might enable you to design “fundability” into a program at the outset. You should seek funders’ input primarily during the environmental assessment stage of the planning process. Current and future funders should also receive an executive summary of the strategic plan.
6. Community Leaders. Community leaders can also offer valuable opinions about your organization’s strengths and weaknesses, as well as insight into the needs of the community and knowledge of the competition. Some organizations include a key community leader on the planning committee, thereby building in community commitment to the organization and its mission.
7. Competitors and Potential Collaborators. You might consider asking competitors to contribute to your environmental assessment — not just to get another outside opinion, but to garner information to help the organization be more competitive and develop collaborative relationships.

E. Participation: Top-Down, Bottom-Up or Hybrid Planning

Finally, a key influence on stakeholder participation is the style used in the planning process, particularly whether your organization uses a top-down or bottom-up planning process. A top-down process assumes that those with the highest level of responsibility are in the best position to be big-picture thinkers and plan what is best for the organization.

The main drawback to this approach is that it often results in plans that do not have the understanding and support of line staff (those most directly involved in providing services to clients), so the plan may not prove feasible or in the best interests of the clients. A bottom-up planning process on the other hand compiles plans from individuals or departments, thereby addressing the need for staff input and investment. Such a process, however, can produce a patchwork plan that lacks coherence for the organization as a whole and results in an uncoordinated, even wasteful, use of resources.

The best approach seems to be a hybrid that strikes a balance between the need for decisive leadership and productive collaboration, featuring the open communication of a bottom-up planning process and the clear direction of a top-down process. The net result is an effective combination of the best of both models of participation; the planning process described in this manual is such a hybrid.

SWOT Analysis Grid*

Strengths	Weaknesses
(Internal)	(Internal)
Opportunities	Threats
(External)	(External)

* The SWOT grid is widely used. It is an adaptation of the Harvard Policy Model, attributed to Christensen, R., et. al., "Business Policy: Text and Cases." Homewood, III.: Irwin, 1983, as cited in Bryson, J., "Strategic Planning for Public and Nonprofit Organizations." San Francisco, CA: Jossey-Bass, 1988.

Internal Infrastructure Evaluation Worksheet

Scale of Importance Performance
Internal 0–Unimportant, 0–Poor,
Infrastructure Issues 10–Critical 10–Excellent
Organizational infrastructure
Public image with customers
Decision making
Planning process
Accounting process
Fund-raising abilities
Service quality
Record of achieving results

A good assessment helps organizations think about some very pragmatic questions:

- . Is ours the best organization to provide this service?
- . Can we offer real value to our clients?
- . Are we spreading ourselves too thin to compete effectively?
- . Should we work cooperatively with another organization to provide services?

You can use a matrix to assess each current (or prospective) program according to the four criteria described below.

1. Competitive Position: the degree to which your organization has a stronger capability and potential to deliver a particular program than other such agencies — a combination of effectiveness, quality, credibility and market share/dominance. Probably no program should be classified as being in a strong competitive position unless it has some clear basis for declaring superiority over all competitors in that program category.

Criteria for a "strong" competitive position include:

- .Good location and logistical delivery system.
- Large reservoir of client, community or support-group loyalty.
- Past success securing funding; strong potential to raise funds for this program.
- Superior "track record" (or image) of service delivery.
- Large "market share" of the target clientele currently served.
- Better-quality service and/or service delivery than competitors.
- Superior organizational, management and technical skills needed for the program.
- Most cost-effective delivery of service.
- Congruence with the purpose and mission of the organization.
- Ability to draw on existing skills in the organization.
- Ability to share resources and coordinate activities with other programs.
- High appeal to groups capable of providing current and future support.
- Stable funding.
- Market demand from a large client base.
- Appeal to volunteers.
- Measurable, reportable program results.

The Six Most Important External Environment Factors Worksheet

This table will assist you in clarifying external trends affecting your organization. List those most likely to have an impact and identify the implications that follow from them.

The Five Most Important Forces Likely to Impact Two or Three Environmental Influences Your Organization in the Implications of Factors Next Three Years These Forces

Political 1. 1.

2. 2.

3. 3.

4. 4.

5. 5.

Economic 1. 1.

2. 2.

3. 3.

4. 4.

5. 5.

Social 1. 1.

2. 2.

3. 3.

4. 4.

5. 5.

Technological 1. 1.

2. 2.

3. 3.

4. 4.

5. 5.

Demographic 1. 1.

2. 2.

3. 3.

4. 4.

5. 5.

Legal 1. 1.

2. 2.

3. 3.

4. 4.

5. 5.

Sample Format for a Strategic Plan:

Table of Contents:

I. Introduction by the President of the Board and Executive Director

II. Executive Summary

III. Vision and Mission Statements

IV. Organization History and Profile

V. Critical Issues and Strategies

VI. Program Goals and Objectives

VII. Management and Development Goals and Objectives

VIII. Appendices (If Included)

A. Environmental Assessment and Critical Issues

B. Data and Assumptions about the Environment

C. Summary of student, staff and community Surveys

D. Membership of Board and Planning Committee

E. Intermediate-Range Budget Projections