



Strategic Planning
Simplified

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What is a Strategic Plan?



- A roadmap that outlines your branch vision, goals and objectives
- A shared view of priorities
 - Include Board members, Program and Project Chairs
 - Include members for greatest impact
- Unique to your branch
 - One size does not fit all
- The *glue*





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What it is Not



- A list of programs
- A list of events
- A mystery to the Board and members
- Done annually, bi-annually
- Put in the drawer
- Static



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Why Plan? "Reactive to Active"



- Develop a common vision
- Clarify values and beliefs
- Focus effort, time and money
- Anticipate opportunities and obstacles
- Show progress
- Balance resources and demands
- Stimulate ingenuity and new approaches



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Elements of a Strategic Plan



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4 Simple Steps




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1 Current State








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- Resources
 - People
 - Money
 - Passion
- Environment (SWOT)




- Commitments
 - Projects
 - Programs
 - Special Interest Groups

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2 Future State



Leadership Development

Mission

Branch Purpose

Start with AAUW's mission


Vision

How you want the world to change


Values

How you will interact with those you serve

Imagine your branch was wildly successful, with unlimited resources, and no barriers whatsoever. What would be different about the world?


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Future State - Mission



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- Personalize the AAUW Mission to fit your branch
- Links to your Vision and tells how you serve people, and what your role will be in delivering the Vision
- It should tell the world the purpose of the branch
- It should be clear and simple

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Future State - Vision



- Imagine your branch was wildly successful, with unlimited resources, and no barriers whatsoever. What would be different about the world?
- Used to inspire your branch and communicate to the community

Future State - Values



- Tells the world how you will interact with those you serve. Which values are important?

Integrity	Teamwork	Partnership	Honesty
Communication	Respect	Safety	Attitude
Customer Service	Trustworthy	Diversity	Individuality
Creativity	Growth	Achievement	Competence
Accountability	Community	Community	Quality
Commitment to Success	Ethical	Legal	Professionalism
Fairness	Responsibility	Consistency	Empowerment
Fun	Risk-taking	Efficiency	Balance
Loyalty	Optimism	Reliable	Inspiring

Future State.....



Making Your Vision Reality

It's about balance

Resources

Projects
Special Interest Groups

Passion
Vision
Values

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3 Goals

Develop an action plan

- It is the “to do” list. It includes goals and objectives and outlines who will do each step and when things will be done
- Goals: Describe how you will meet the vision
 - Establish priorities to help focus energy and resources
 - Can be long or short term
- Objectives: Describe how you will meet the goals
 - They should be SMART

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SMART Goals and Objectives

- **Specific:** clearly stated in precise terms.
- **Measurable:** you can tell if you have achieved it or not
- **Achievable:** it is possible, you have passion to complete
- **Realistic:** not only is it possible, it is possible for you given your circumstances
- **Timely:** there is a date attached to it

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4 Evaluate Progress



- As you implement the plan, monitor the progress
Adjust along the way to keep on track
- Evaluate what worked, what didn't and why so that
you can make your next plan even better
- Report your success
- Celebrate



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SWOT Analysis

SWOT analysis is a structured planning method used to evaluate Strengths, Weaknesses, Opportunities and Threats involved in a project or business venture.

- A scan of the organization at the 30,000 foot level
- A holistic picture of the organization and its niche – matching the organization goals with the environment
- Shows you the organization's strengths and vulnerabilities
- Gives us a filter against which to make decisions



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Internal	
Strengths are current conditions internal to our work that we can take advantage of to help us achieve our sustainability ambitions.	Weaknesses are obvious, or sometimes not so obvious, current conditions internal to our organization that will hinder our ambitions unless we develop a way to address, correct or avoid them.
External	
Opportunities are the factors that are current, but external to our program/partnership that create an ideal climate to accomplish our ambitions.	Threats are the factors that are current, but external to our program/partnership that could get in our way of accomplishing our ambitions if we don't have a plan for responding to them

SWOT Analysis



Strengths	Weaknesses
<ul style="list-style-type: none"> • Do we have a deep, experienced, engaged Board of Directors? • What are our assets and which is strongest? • What differentiates us from others that provide similar services? • Do we have immensely talented people? • What unique resources do we have? • Do we have a sustainable competitive advantage? • Do we have specific expertise that others do not have? • What unique funding sources do we have? • Age of organization, Tenure of leadership? • Is it easy to donate or participate? • Do we have a Reputation? 	<ul style="list-style-type: none"> • Are members engaged in our mission? • Do we have good participation in programs and projects? • Do members feel committed to the organization? • What areas do we need to improve on? • What necessary expertise do we lack? • In what areas do other non-profits have an edge? • Are we relying on one funding source too much? • Do we have a well of new ideas? • Is our mission overly broad? • Do we have a lack of education or experience • Are we short-staffed? • Do we have public awareness?

Opportunities	Threats
<ul style="list-style-type: none"> • What external changes present interesting opportunities? • What trends might impact our services? • Is another non-profit providing services in an adjacent space that we can team up with? • Is there an unmet need/want that we can fulfill? • Are there trends emerging that we can profitably service? • Can we geographically expand our footprint? • Can we identify new funding sources? • Demographic trends • Influential connections? • Recent good press? 	<ul style="list-style-type: none"> • Are we vulnerable to economic conditions that could impact our funding? • Is there an entity that may move into our space and offer the same or similar services? • Are our key staff satisfied in their work? Could they be poached by another non-profit or for profit organization? • Any recent bad press? • Demographic trends • Rising program costs?



Creating a Vision

- What is it we do? – What is our vision for the organization?**
- Why do we exist? Why do we do what we do?
 - What about AAUW is important?
 - If AAUW didn't exist, what would the world miss?
 - What do we want to achieve?
 - To what needs do we respond?
 - Why did you join this group?
 - In the end, for what must this group be remembered?
 - From the AAUW's perspective, what challenges face the community today?
 - What business are we in? What business do we want to be in?

Reviewing our current activities against our vision:

- Which fit?
- Which don't and why?
- Could they be adjusted or should they be removed?
- What additional projects should we consider?



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A good Vision Statement

results in the following:

1. Excitement
2. The need for immediate action toward a shared goal
3. An anticipation of future accomplishment
4. When fulfilled, meaning for individuals, the community and the world
5. Memorization in fewer than 15 minutes