

# Strategic Planning

CREATING VALUE IN THE STRATEGIC PLANNING PROCESS

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# What does your current SP process look like?

- ▶ Frequency?
- ▶ Participation?
- ▶ Measurability?
- ▶ Quality?
- ▶ Moderator?
- ▶ Length of event?

# Why are you here?

- ▶ What problems are you looking to solve?
- ▶ What are you looking to improve?
- ▶ What do you want to walk away with?

# Background – WHY this process

- ▶ Why?
  - ▶ Ineffective
  - ▶ Long process (with volunteers)
  - ▶ Not measurable
  - ▶ Same goals year after year
  - ▶ Lack of clear direction
  - ▶ Unrealistic
  - ▶ Non existent

# Prepare . Strategic Planning . Follow Up

## ► Prepare

- Strategic planning is an on-going process – prepare material for the SP session all year long
  - Event data document
  - SP updates at Board meetings
  - Ongoing SP evaluations/updates
  - SP annual evaluation
  - Share with members
  - Discuss at staff meetings
  - The marker board
  - Staff recommendations
  - Member survey results (The Ultimate Question)

Events Data Worksheet								
Event/Program	Staff Hours	Volunteer Hours	Members Touched (# participants)	Sponsorship \$	Participant \$	Total Income	Expenses	Net Revenue
Event A	45	14	73	\$250.00	\$459.00	\$805.00	\$629.30	\$175.70
Event B	46	8	133	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Event C	253	133	560	\$9,150.00	\$14,530.00	\$32,157.00	\$15,615.16	\$16,541.84
Event D	58	13	100	\$250.00	\$666.00	\$1,035.00	\$900.00	\$135.00
Event E	47	12	81	\$350.00	\$468.00	\$911.00	\$723.00	\$188.00
Event F	129	5	130	\$4,450.00	\$7,140.00	\$11,687.53	\$6,294.52	\$5,393.01
Event G	72	16	134	\$250.00	\$792.00	\$1,191.50	\$1,359.35	(\$167.85)
Event H	143	53	79	\$4,635.00	\$5,955.00	\$10,973.00	\$4,407.83	\$6,565.17
Event I	38	30	93	\$250.00	\$585.00	\$671.00	\$675.00	(\$4.00)
Event J	209	175	314	\$1,825.00	\$5,570.00	\$7,749.00	2,404.56	\$5,344.44
Event K	46	12	52	\$250.00	\$216.00	\$522.00	\$468.00	\$54.00
Event L	62	18	13	\$2,200.00	\$0.00	\$2,200.00	\$2,200.00	\$0.00
Event M	58	63	535	\$0	\$510.00	\$1,375.00	\$1,702.13	(\$327.13)
Event N	52	0	48	\$400.00	\$480.00	\$880.00	\$1,070.40	(\$190.40)
Event O	78	0	20	\$250.00	\$0.00	\$300	\$200.00	\$100.00
Event P	80	0	85	\$0.00	\$75.00	\$75.00	\$40.00	\$35.00
Event Q	331	377	251	\$6,300.00	\$5,215.00	\$11,275.00	\$3,407.93	\$7,867.07
Event R	188	153	54	\$0.00	\$0.00	\$22,922.38	\$21,660.00	\$1,262.38
Event S	90	0	62	\$450.00	\$1,125.00	\$1,575.00	\$1,320.00	\$255.00
Event T	190	100	71	\$125.00	\$0.00	\$125.00	\$450.00	(\$325.00)
<b>Total:</b>	<b>2215</b>	<b>1182</b>	<b>2,888</b>	<b>\$31,385.00</b>	<b>\$43,786.00</b>	<b>\$108,429</b>	<b>\$65,527.18</b>	<b>\$42,902.23</b>

# Prepare . Strategic Planning . Follow Up

- ▶ Strategic Planning (the actual day of planning)
  - ▶ Short and sweet! (completely possible if the prep work has been done all year leading up to this point in time)
  - ▶ Write the Chamber's MISSION STATEMENT clearly for all participants to see
  - ▶ Present all materials in advance
  - ▶ Agenda:
    - ▶ Introduction of the process and resources/tools available
    - ▶ Evaluate last year (staff present evaluation to Board)
    - ▶ Explore the data and staff recommendations
    - ▶ Add other ideas, discuss (including marker board ideas)
    - ▶ FIND PATTERNS (grow strengths, eliminate/change areas that are weak)
  - ▶ Hire someone or not?
  - ▶ Staff present or not?
  - ▶ Who takes notes?

# Prepare . Strategic Planning . Follow Up

- ▶ Follow Up: What happens next?
  - ▶ Your strategic planning session doesn't end with the actual written plan
  - ▶ Staff (or your facilitator) will take the discussion and information back to wherever he/she takes it and creates a draft plan based on resources, reality, discussion
  - ▶ Present the draft plan at the next Board meeting/with staff
  - ▶ Discuss and adopt
  - ▶ Share with members

# When this happens, squash it

- ▶ Off topic
- ▶ Too much chatter
- ▶ Too big of a plan
- ▶ Ideas that don't fit within the mission
- ▶ Participants who would rather be elsewhere, or don't show up at all
- ▶ The squirm
- ▶ Domination
- ▶ Saving Santa Claus



# WHY this works

- ▶ Succinct
- ▶ Is an effective use of time AND creates an effective plan
- ▶ Easy to understand and explain the process and product
- ▶ Easy to measure
- ▶ Easy to update members
- ▶ Fits the mission
- ▶ Strong and valuable

# Questions

- ▶ ?
- ▶ ?
- ▶ ?
- ▶ ?