

Presentation Overview

Imagine what it would be like to take a hike in the forest without taking along a trail map. Now imagine taking that hike with the entire board and every employee of the organization and you'll understand how important a map — or a plan — can be for ensuring that everyone stays on the right trail and comes out of the forest successfully.

Embarking on a strategic planning process takes time and commitment on the part of board and staff. With the organization's future success as the group's objective, having a road map to navigate the planning process helps lead to better understanding and cooperation.

Presenting: Strategic Planning is to be used in a facilitated discussion that promotes the decision making needed to proceed with a strategic planning process. It poses valuable questions in determining whether the organization is ready to move forward and what the best approach is to strategizing. This product will not result in the creation of a strategic plan. It should not be used in place of a formal guidebook on the subject; rather, the presentations should be used as a group exercise in learning about strategic planning and how your organization should proceed. For additional information on strategic planning, see the Suggested Resources on page 23 of this guide.

While there are many resources available on strategic planning that provide a traditional, one-size-fits-all point of view, these slides offer a dynamic look at both conventional and less traditional methods for planning. They provide guidelines for choosing the right method for moving ahead, techniques for thinking creatively, and suggestions for incorporating approaches to creative thinking.

The *Presenting: Strategic Planning* PowerPoint presentation can be found on the CD-ROM in the back of the book. The slides provide

- an introduction to the strategic planning process
- questions for assessing the organization's readiness to plan
- a detailed outline of what board and staff should expect during planning
- a thorough step-by-step look at approaches to planning
- tools to help board and staff choose the right approach for planning the organization's future

THE ROLE OF THE FACILITATOR

In order to be able to facilitate an effective discussion on strategic planning, the individual presenting this slide show should be experienced with the planning process. The presenter could be the chief executive, board chair, a planning consultant, or even a board member who is able to remain objective throughout the discussion. The benefit of using an outside presenter is to allow all key internal members to participate

fully in dialogue, brainstorming, and decision making for the organization. It may make sense for the presenter to be whoever has identified the need for and is initiating the strategic planning process. Even if the organization does decide to hire an outside consultant to help guide the actual strategic planning process, an outsider is not necessarily needed to lead this discussion.

The facilitator should thoroughly review this presentation prior to presenting to the group to gauge his or her comfort with the process and decide if more personal preparation is needed. The facilitator should also pay close attention to the present circumstances of the organization, and customize the slides as he or she sees necessary. While examples have been provided in the talking points throughout the presentation to help better understand some of the concepts, the facilitator may choose to use the examples provided or create his or her own examples that are more relevant to the organization. Also included on some of the slides are presentation notes that suggest topics and questions for group discussion. It will take time for the facilitator to read through these notes beforehand and plan accordingly. The more comfortable the facilitator is with the topic and the slide presentation, the more successful the discussion will be.

It is the job of the facilitator to communicate to the group the purpose of the discussion, the role of the audience, and the intended outcome. The facilitator is also responsible for asking questions of the group, answering questions, defining terms, suggesting group discussion topics, and ensuring that the presentation moves forward without unnecessary interruptions. Prior to presentation, the facilitator should decide how long to spend on each discussion so he or she may plan appropriately for the length of each slide show. The facilitator should guide the participants and decision makers to stay focused, and must refrain from imposing his or her own opinions.

HOW TO USE THE PRESENTATION

APPROPRIATE AUDIENCE

Strategic planning is a job shared by both board and staff; therefore, every board member should view these slides, along with the key staff members chosen to be more directly involved in planning. Some members of this group will likely develop into a strategic planning steering committee — the body that guides the planning process. This tool is meant to be used internally with the most important players, meant to be customized so that it makes sense for each individual organization, and meant to provide an outline for discussion and decision making that will push the group into action steps. The audience is expected to follow the guidance of the facilitator and participate in brainstorming, breakout discussions, and decision making.

VIEWING THE PRESENTATION

The facilitator of the discussion should consider planning a joint board/staff meeting around the theme of strategic planning. If the organization has an existing plan, make copies and circulate them to board and staff prior to the meeting. At the meeting, review the existing plan (if applicable) and present Section 1 of the slide show, *Strategic Planning: The Basics*.

Section 1 is ideal for groups that are new to strategic planning, for organizations that have not engaged in planning for several years, or for members of the strategic planning steering committee who could benefit from a brief refresher on the basics of planning (see page 5 for more details on Section 1). After viewing Section 1, if the group feels that it is ready to move on to discuss the different methods of planning and does not need to conduct more preparation work or assessment as discussed in Section 1, Section 2 (*Approaches to Strategic Planning*) may be appropriate for this meeting time as well (see page 6 for more details on Section 2). Otherwise, a separate meeting for viewing Section 2 should be scheduled.

Again, it is important to factor time into the meeting schedule for group discussion and sharing. Depending on the size of the audience, the participants can break into small groups to discuss the topics and elect a reporter to communicate ideas back to the larger group.

After moving through Sections 1 and 2 — whether or not they are viewed in the same session — the group may be ready to determine what the organization's goals are for planning, and to select the approach for developing strategies. Once the appropriate planning approach has been selected, the strategic planning group, or steering committee, then chooses to view either Section 3(a) (*Contextual Approach*) or 3(b) (*Revolutionary Approach*) for an overview of the guidelines for creating strategies. If the committee also chooses to adopt the *Insightful Approach to Strategy Development* into its process of strategic thinking, then proceed to Section 4. It is up to the planning group to decide the timeline for next steps in the facilitated discussion. Again, the facilitator of the presentations should be familiar with all sections before presenting to the group, and can help the planning group decide how best to proceed after the introductory sections (1 and 2).

BEGINNING TO PLAN

LEARNING THE BENEFITS OF STRATEGIC PLANNING

The first step to planning is to understand *why* it is needed. Having strategies allows an organization to find the best approaches to implementing its mission, build on its assets, recognize its weaknesses, and anticipate any problems that may arise. Strategic planning provides guidance and direction for the staff and a tool for the board to hold the organization accountable to fulfilling its mission. It creates a framework within which priorities can be set and a coherent focus given to program implementation. It offers stakeholders, funders, and consumers an opportunity to know and therefore more effectively support the mission of the organization.

ASSESSING READINESS

The next step is to determine whether the organization is *ready* to embark on strategic planning. This includes establishing whether the organization is in a proper state to begin the process, and if board and staff are ready to commit to the time and effort required to complete it.

MOVING FORWARD

If your board finds that it is ready for the planning process, there are many different methods of strategizing to come up with a final plan and implement your organization's goals. By learning more about what the strategic planning options are, your board can evaluate its specific needs, expectations, culture, and present state to identify a planning method that fits the organization best. As soon as you have identified the appropriate method, you will discover the specific elements of that method and suggestions for how to proceed.

This tool encourages and guides organizations through three different levels of assessment and next steps — readiness, learning more about what's right for your organization, and choosing an appropriate planning method. *Presenting: Strategic Planning* is not intended to make decisions for every organization; this judgment needs to come from inside the organization and will require group thinking, awareness, and preparation.