

**Standard Strategic Planning Process:**

Strategic Planning is probably one of the most important processes undertaken by any organisation, yet all too often, it is ignored or put into the ‘too hard’ basket. Undertaking the process will clarify:

* Where you are – Analyse and assess
* Where you want to be - Vision
* How you get there – Plan and Execute

This resource aims to outline the process in easy to understand stages, to support organisations to ‘take the plunge’.

The diagrams and notes following this explanation will help to clarify the process

Key Points:

* The process is one of consultation it is NOT dictatorial
* The opinions of ALL your stakeholders are important
* The process gives your organisation long-term direction
* The completed Plan is still a working document that needs to be regularly reviewed
* The alignment of your organisation to achieve the strategy is imperative

The following process is ideally completed over a three month period but is often longer to ensure quality consultation:

**Step One:**

Staff and Board Session (2hrs)

* Develop Mission and Vision statements
* Develop Values and their meaning
* Undertake a SWOT analysis

**Step Two:**

Stakeholder Survey (3 – 4 weeks)

* What do they think / want?
* Develop and issue a Stakeholder Survey

**Step Three:**

Stakeholder Workshop (2.5hrs)

* Stakeholder/ staff/ Board workshop to dig deeper into identified items

**Step Four:**

Board Strategic Plan Sub-Committee Workshop (2hrs)

* To develop and finalise draft plan

a) discuss stakeholder feedback compared to Board / staff feedback

b) draft plan developed based on the workshop outcomes

**Step Five:**

Board approve draft Strategic Plan

**Step Six:**

Draft Plan sent out to the community for consultation (3 weeks)

* Last chance for feedback.
* Good way to engage stakeholders, sponsors and funding agencies

**Step Seven:**

Board approve Strategic Plan after consultation process completed

* Strategic Plan formalised and communicated to all

**Additional Notes:**

**Mission Statement**

States your purpose – ‘Why you exist’

**Vision statement**

States a destination that is measurably different from current reality – ‘Where you want to be’

**SWOT Analysis**

Analyses your organisation’s **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats

**Plan Template:**

 **VISION**

Strategic

Outcome 1

KPI’s

1.

2.

3.

Strategic

Outcome 2

KPI’s

1.

2.

3.

Strategic

Outcome 5

KPI’s

1.

2.

3.

Strategic

Outcome 4

KPI’s

1.

2.

3.

Strategic

Outcome 3

KPI’s

1.

2.

3.

Strategic

Initiatives

1.

2.

3.

Strategic

Initiatives

1.

2.

3.

Strategic

Initiatives

1.

2.

3.

Strategic

Initiatives

1.

2.

3.

Strategic

Initiatives

1.

2.

3.

* Strategic Outcomes are the ‘What’ we want to achieve – the Pillars of the Strategic Plan
* Strategic Initiatives are the ‘Actions Required’ to enable each Strategic Outcome to be achieved
* If Strategic Outcomes are the ‘What’ - then KPI’s are the ‘How we know we have achieved it’
* KPIs must be SMART goals
* Require current situation (baseline) to allow us to identify success and change

**Organisational Alignment**

|  |  |  |
| --- | --- | --- |
| **Strategy Alignment Checklist** | **Yes** | **No** |
| **Leadership** | Is the Board supportive of the strategy?Is Board reporting linked to the strategy?Do we have capable leaders within the organisation? |  |  |
| **Structure** | Is our organisation structured into units that effectively support and deliver the strategy? |  |  |
| **People** | Do we have the people with the right skills needed to deliver our strategy?Do our people support the strategy? |  |  |
| **Stakeholder Management** | Do we have effective communications with stakeholders?Are we communicating the new strategy to stakeholders? |  |  |
| **Incentives** | Is our remuneration and rewards system aligned with the strategy?Are individual performance goals aligned with the strategy? |  |  |
| **Culture** | Does our existing organisational culture (actual not espoused) support our strategy? |  |  |
| **Resources** | Are our resources aligned to the strategy?Do we have enough resources (people, financial, time, other resources)? |  |  |
| **Support Systems and Processes** | Are our systems facilitating the effective delivery of the strategy?Do we have adequate systems in place to monitor the strategy? |  |  |
| **Risk Management** | Have we identified the major risks associated with the strategy? Are we prepared to respond accordingly? |  |  |