

# STRATEGIC PLANNING OVERVIEW, PROCESS & ELEMENTS

## PURPOSES & BENEFITS

Developing a strategic plan is critical to the success of the collaborative group's community organizing work. As Joel Barker stated, "*Vision without action is daydreaming, but action without vision is just random activity.*" A strategic plan not only prevents random activity by connecting actions to the larger vision, it also:

- Creates a coordinated, comprehensive and synergistic approach to the work the group is trying to accomplish, and it's even in writing!
- Avoids group chaos, conflict and confusion among group members by getting everyone focused and on the same page about the group's smaller activities and steps to meet their agreed upon priorities, which all work together to help realize their collective vision.
- Provides an opportunity for input and involvement from other key stakeholders in the community who are not involved in the detailed work of the collaborative group but are important to the group's work.
- Helps the group to consider how to demonstrate successful activity through measurable objectives that are tied directly to the plan.
- Provides a means for tracking plan progress as the plan is being implemented.

Once a collaborative group has prepared for strategic planning by completing Step 2 – Get In the Know by Taking Stock, the group is ready for strategic planning.

The strategic plan should include:

- Identification of a preferred future vision for the local community.
- Strategies to further identify how the preferred future vision, as well as the collaborative group's vision and mission statements, will be accomplished.
- Measurable outcomes to demonstrate plan implementation success.
- The specific activities and action steps that you'll engage in to successfully implement the plan and demonstrate measurable outcomes.
- Identifying the resources needed to make the plan a success.

The process for and details of these strategic plan components are outlined in the "How to Use This Tool" section on the following page.

It may also be important to consider other stakeholders to include in addition to the collaborative group members in the planning process. They might include some of the people that were identified in Step 1A in the stakeholder map but aren't part of the ongoing core collaborative group, and/or participated in surveys, key informant interviews, focus groups or listening sessions in the last step.

Inviting these people to the planning table will further help to ensure the development of a comprehensive community organizing strategic plan that reflects the local community's ideas and solutions, which is important, since community problems like sexual and domestic violence require community solutions in order to overcome them.

These people may also be an asset in helping to promote and/or implement the plan, as well as demonstrating the plan's success and spreading the good word about the collaborative group's community organizing efforts throughout the local community. All of these are important next steps to be accomplished once the community organizing strategic plan has been developed.

Finally, don't forget about the importance of setting the right meeting environment during the strategic planning process. The "Creating the Right Meeting Environment" document first



introduced in Step 1A above is provided in this step again for your use in helping to plan the strategic planning meeting(s).

The tools in this document help a group during strategic planning to define the strategies, measurable outcomes and action steps for the community organizing plan that are based upon the vision and mission statements already developed by the collaborative group in Step 1B – Setting Your Group Up for Success: Tools for Defining Your Purpose(s). Strategies further identify how the vision and mission will be accomplished. Measurable outcomes demonstrate the success of plan implementation, and action steps identify the specific activities that you'll engage in to successfully implement the plan and demonstrate measurable outcomes.

## HOW TO USE THIS TOOL

The collaborative group can use this tool to develop a community organizing strategic plan, identifying the key detail elements of the strategic plan (i.e., strategies, measurable objectives and a work plan).

The steps to strategic planning involve using the consensus decision process, including brainstorming and consensus building tools. This process and example tools are outlined in the “Consensus Decision Process with Brainstorming & Consensus Tools” document in Step 1C: Setting Your Group Up for Success: Tools for Determining How You'll Work Together of the toolkit. The major steps (i.e., the consensus decision process) are as follows:

1. **Set the goal.** The collaborative group needs a clear end-in-mind. The first consensus decision is to determine the end goal. Without an agreed upon goal, collective consensus will be impossible. This can be accomplished by sharing the collaborative group's vision and mission statements developed in Step 1B: Setting Your Collaborative Group Up for Success: Tools for Determining Your Purpose(s) with planning participants.
2. **Create a vision.** Ask a question that inspires vision. Here are some examples:
  - *What is our ideal or preferred future?*
  - *What are the indicators of a good outcome?*
  - *What would it look like if we got it right?*This can be accomplished by conducting a visioning activity with planning participants. Some example visioning activities can be found in the same section of the toolkit as this document. Additional ideas for constructing a good question can be found in the “Appreciative Inquiry” tool, which is located in the “Universal Community Organizing Concepts” section of the toolkit. When creating a vision, it helps to understand what is essential for the outcome to include and what is desired but not required.
3. **Gather information.** What information does the team need in order to make the best decision? Who has or where is this information, and how do we obtain it? This is addressed by the community readiness and needs and resources assessment tools in Step 2 of the toolkit – Get in the Know By Taking Stock.
4. **Brainstorm possible options and ideas.** Develop as many options as possible before narrowing the list of ideas. The example brainstorming tools listed on the following pages can be useful in completing this step in the consensus decision process. In addition, the facilitative leader ensures everyone understands the meaning of each idea before moving forward.
5. **Set priorities for possible options and ideas using relevant criteria.** Once the group has brainstormed all of the possibilities, it's time to prioritize the ideas. Using relevant criteria will help the group to prioritize ideas more objectively. The example consensus building tools listed on the following pages can be useful in completing this step in the consensus decision process.



6. **Make the decision as a team.** The facilitative leader checks to make sure there is full consensus before assuming everyone supports the decision. One way to do this is to use a bus analogy: The bus is leaving the station. Can you get on board? If not, what will it take to get you on our bus?

Once the planning participants come to consensus by setting priorities for the plan strategies, either they or the core collaborative group can work to develop the measurable objectives and work plan for those strategies.



## FROM STRATEGIES TO ACTION STEPS PROCESS

### **Strategies**

Strategies relate to how the preferred future vision developed by the planning group and/or the vision and mission statements developed previously by the collaborative group will be attained.

#### **Example Strategies**

- *“To advocate for comprehensive and affordable healthcare for seniors with elected officials and policy makers.”*
- *“Develop and sustain a strong membership for the organization.”*

#### **How to Develop Strategies**

Use the “Developing Strategies Process ” on the following page to develop the key community organizing strategies.

### **Measurable Outcomes**

Answers the questions – What will you do or what will you change? For whom and for how many (i.e., target population)? By how much? When will it occur? How will it be measured (i.e., How will we know we have accomplished this?)?

- Don’t just restate the mission, goals, guiding principles or strategies.
- Outcomes should be measurable and time bound.

#### **Example Measurable Outcomes**

- *“At least 80% of all current members will renew their membership in 2010 as measured by membership renewal records.”*
- *“80% of youth ages 10 – 20 in targeted public schools will demonstrate a 75% increase in knowledge regarding how to be an empowered bystander by the end of the training sessions as measured by a pre and post training assessment tool.”*

#### **How to Develop Measurable Outcomes**

Use the “Creating Measurable Outcomes Worksheet” on the following pages to develop measurable outcomes statements by answering questions for each of the key strategies, once developed.

### **Work Plan**

A work plan spell out the related activities, additional resources and action steps needed in order to successfully implement the key strategies and measurable outcomes developed.

#### **How to Develop a Work Plan**

Use the “Related Activities, Additional Resources and Action Steps Worksheet” on the following pages to:

- Identify related activities and additional resources needed for the successful implementation of the strategies and measurable outcomes developed, providing responses on the identifying related activities, resources and action steps worksheet attached.
- Identifying action steps for the activities and additional resources identified, providing responses on the identifying related activities, resources and action steps worksheet attached.



## DEVELOPING STRATEGIES PROCESS

Try affinity brainstorming to develop initial strategies (See the “Consensus Decision Process with Brainstorming & Consensus Tools” document in Step 1C: Setting Your Group Up for Success: Tools for Determining How You’ll Work Together of the toolkit for further details on affinity brainstorming, other brainstorming processes and the consensus decision process). The affinity brainstorming process is as follows:

1. Start this process by asking planning participants a “how can we achieve our vision or preferred future” question, such as:
  - *“If we got it right in our local community, what are all of the possibilities for community organizing efforts to address sexual and domestic violence?”*
  - *“In order to make our preferred future vision to end sexual and domestic violence in our local community a reality, what are all of the possible community organizing efforts we need to be doing in the next three years?”*

For further ideas on constructing good framing questions for expanding thinking/brainstorming, see the “Appreciative Inquiry” tool located in the “Universal Community Organizing Concepts” section of the toolkit.

2. Ask planning participants to work individually or in small groups to answer the question posed, writing down all their ideas on post-it notes (the 3x5 post-it notes are the perfect size) and listing only one idea per post-it note. Remind them that they are brainstorming right now and to not censor or limit any ideas at this point.
3. Conduct a call and sort activity as follows:
  - Start this activity by asking for a volunteer to read one of his/her notes and place it on a blank flipchart.
  - Ask if anyone has written down a similar idea and read each note as it is placed on the same flipchart.
  - Once a few similar ideas are placed on the same flipchart, ask the group to name the natural relationship between the ideas and record it on the flipchart as a heading. These identified natural relationships can be referred to as themes.
  - Once all of the similar ideas have been called out, ask for a new idea and post it on a new flipchart. Replicate the process outlined in the bullets above to identify a theme.
  - Continue to call and sort ideas until all post-it notes are posted on flipcharts and themed. Allow the group to direct the movement of post-it notes to different flipcharts as the group refines the natural relationships between their ideas.

Here are some examples of possible strategic themes that might emerge:

- Influence Policy and Legislation
- Change Organizational Practices
- Foster Coalitions and Networks
- Educate Providers
- Promote Community Education
- Strengthen Individual Knowledge and Skills

Next, have participants work in small groups to further develop the strategies generated during brainstorming above in order to prepare for the next step in the process, which is consensus building by:

1. Self-selecting into the strategic theme area you wish to work on further.
2. As a group, select a:
  - Facilitator to keep the group on time and on focus.
  - Recorder to help the group sort the post-it notes and write down the group’s strategies.
  - Spokesperson to call out strategies developed to full group.
3. Review the post-it note ideas, sorting and grouping them together into “like ideas or themes” onto separate flipchart paper sheets provided.

- One idea/ theme per flipchart paper sheet.
  - Develop a strategy for each grouping of post-it notes using the pre-made voting flipchart (See the example voting flipchart in the “Consensus Decision Process with Brainstorming & Consensus Tools” document in Step 1C: Setting Your Group Up for Success: Tools for Determining How You’ll Work Together of the toolkit).
4. You can ask groups to select their top 3-5 strategies developed to advance to the next step in the process – consensus building/setting priorities; this will begin the process of consensus building.
  5. Group spokespersons present the work of the breakout groups to the full group.

The final step in this process is consensus-building. Because the previous step set the group up for the voting method of consensus-building, the task of the full group is now to set priorities by voting for their top strategies.

1. Give each member of the group a specific number of voting dots (depending on the number of ideas listed under a theme).
2. Group members then vote for their top idea(s) based upon the number of dots given to each member. Group members should not vote for an idea more than once in order to avoid vote loading for a particular idea.
3. Allow time for each person to vote and then call out the results for each theme.
4. Proceed with the ideas that received the most votes to develop measurable objectives and a work plan.

## CREATING MEASURABLE OUTCOMES WORKSHEET

Strategy	Measurable Outcomes Questions		Measurable Outcomes Statements
<b>1.</b>	What will you do or what will you change?		
	For whom and for how many (i.e. target population)?		
	By how much?		
	When will it occur?		
	How will it be measured?		
<b>2.</b>	What will you do or what will you change?		
	For whom and for how many (i.e. target population)?		
	By how much?		
	When will it occur?		
	How will it be measured?		
<b>3.</b>	What will you do or what will you change?		
	For whom and for how many (i.e. target population)?		
	By how much?		
	When will it occur?		
	How will it be measured?		

**CREATING MEASURABLE OUTCOMES WORKSHEET**

Strategy	Measurable Outcomes Questions		Measurable Outcomes Statements
4.	What will you do or what will you change?		
	For whom and for how many (i.e. target population)?		
	By how much?		
	When will it occur?		
	How will it be measured?		
5.	What will you do or what will you change?		
	For whom and for how many (i.e. target population)?		
	By how much?		
	When will it occur?		
	How will it be measured?		
6.	What will you do or what will you change?		
	For whom and for how many (i.e. target population)?		
	By how much?		
	When will it occur?		
	How will it be measured?		













