

Strategic Planning **Guide**

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What is Strategic Planning?

Strategic planning is an organizational process that establishes a common sense of what the organization is planning to do and when and how they are going to do it.

Strategic planning is beneficial for organizations when compared to less formal planning strategies for two main reasons:

1. It helps people deeply understand and articulate a shared vision for their organization, which ultimately strengthens the organization; and
2. When done well, a strategic plan can guide an organization over a much longer term than more informal, individualized visions.

There are many ways to go about developing a strategic plan, all with strengths and weakness. A strategic planning process and the resulting document can be very complex and comprehensive, or relatively swift and simple: anything from a continuous, many year development process with a 30+ page document to a few months resulting in 5 pages or less. Deciding the character of your plan will be part of the planning process.

Below is a comprehensive summary of the most common components that would go into a strategic planning process. Some of these areas will require more time and energy than others, depending on the needs of your organization. Agree early on what you're going to focus on.

Development Process

Getting Started

When getting started, keep these things in mind.

Organizational carrying capacity

- How likely is it that a 30+ page strategic document will be read, never mind implemented, from year to year?
- Will a 5 page summary be enough, or will being so concise/vague cause the intent and meaning of the document to be lost as soon as the original writers are no longer with the organization?
- How many hours of volunteer time can you reasonably expect to spend on this planning process? Are your goals for the process realistic from the perspective of how much time you can invest?

Strike a balance between planning and constraining.

- Planning helps, constraining hurts, especially in organizations with elected officers.
- Your successors need the plan to be flexible enough to accommodate their goals too. If the plan is too inflexible, it will probably be ignored.

How much consulting do you need to do?

- You need to enough to ensure that the document has legitimacy and buy-in, but too much will encumber the process unnecessarily and cause frustration.

Getting the Team Together

While a strategic plan can and indeed must be managed by the Executive team of your organization, Executive members tend to be very busy with their other responsibilities, especially in volunteer organizations. They also represent a very narrow cross-section of members who will have a stake in the strategic planning process.

Many professional organizations hire a strategic planning consultant. These professionals tend to be very expensive, and are likely outside of the budget for most FAs. Instead, look at having a Strategic Planning Committee with student volunteers. At the very least, have a volunteer strategic planning coordinator whose job includes drafting the document and recording meeting notes.

Timeline

Set deadlines for the different phases of planning and stick to them. Good strategic planning takes at least a couple of months, so plan for at least a semester of development from start to finish.

Strategic Analysis

Understanding where you want to go must be based on first understanding where you are.

There are a number of strategic analysis tools and frameworks available, many with explanations freely available online. Conducting a SWOT (Strengths, Weaknesses, Opportunities & Threats) analysis is a very common exercise. A sample explanation of the SWOT process as well as a worksheet template can be found here:

http://www.mindtools.com/pages/article/newTMC_05.htm

Consultation Framework

Seeking feedback and input on your strategic plan while it's being developed is a good idea. It's also a good idea to plan out:

Who you would like to seek this feedback from
What specific feedback you want from each group
When during the process you are going to seek it out.

Groups that you consider consulting with might include some or all of these people, as well as others specific to your organization:

- A Strategic Planning Working Group or Subcommittee
- Current executive and/or Council members
- Past executives and/or Council members, in an advisory capacity
- General Membership
- Key stakeholders such as your Dean's office, professional organizations you work closely with, services you support, other student groups, the SU Vice President Academic, etc.

How you consult with them depends on the kind of working relationship you have with each of them.

Key Components

There are different definitions for the following key components, and some of them overlap. This summary should, however, help you get started. There are arranged in a roughly chronological order in terms of the development process.

Mission

What is the organization's purpose and focus? Some guidance for this is provided in the legal framework that establishes FAs (SU Bylaw 8100 & 8200).

Example: "Our mission: to explore strange new worlds. To seek out new life and new civilizations. To boldly go where no man has gone before."

Values

What principles does the organization stand for? What standards of behaviour does it set for itself?

Example: One of the values articulated in the current draft of the Students' Union Strategic Plan is "**Plan for tomorrow.** We act with future students in mind by making sustainable choices."

Vision

The vision defines the future state that the organization's strategic plan will guide the organization towards.

Example: For the Public Good, the University of Alberta strategic plan, outlines the following vision: "To inspire the human spirit through outstanding achievements in learning, discovery, and citizenship in a creative community, building one of the world's great universities for the public good."

Critical Success Factors

Those things that must go right, individually and collectively, in order for the organization to achieve its vision and mission.

Example: In order for a political party to achieve its vision and mission for the country/province/etc. that they wish to govern, their party must elect enough candidates to act as the governing party.

Goals and Objectives

Goals & objectives are the action items of the plan. Many strategic planning exercises develop a SMARTER approach to setting goals and objectives; that is to say that goals & objectives should be set that are

Specific

Measurable

Aligned with the central functions of the organization

Realistic

Time-bound

Extending the capabilities of the organization and its personnel

Rewarding for the organization and its personnel to pursue

Strategic Goals

These are “big picture” achievements that the organization will strive for over the long term. Though they are big picture, they still need to be SMARTER, and it needs to be clear how Strategic Goals rely on Critical Success Factors, relate to the fulfillment of the mission & vision, and reflect the values of the organization.

Example: Effective development of institutional memory

Strategic Objectives

These are more tangible, often shorter-term action items that work together towards strategic goals. Strategic objectives may serve more than one Strategic Goal.

Example: An Executive Transition Report Template will be developed and implemented for use for the transition between incoming and outgoing Executive.

Accountability Framework

Effective strategic plans need to be an official part of the organization’s structure that people pay attention to from year to year. It is beneficial to consider and implement one or more of the following structures when conducting strategic planning, particularly for the first time:

- Institutionalized and regularly scheduled progress reviews
- Making the document ‘official,’ in the constitution or in job descriptions
- Plans for redeveloping the strategic plan

Refresh Cycle

If your strategic planning exercise is successful, your organization will grow and change. It’s a good idea to give strategic plans a “shelf life” so that people review them instead of abandoning them when they start to become outdated. A 3 or 4 year shelf life for strategic plans is probably a good timeframe.

Other Resources

The Students' Union office of Discover Governance (governance@su.ualberta.ca) is available to assist with strategic planning and other activities undertaken by student groups to improve their governance effectiveness. Below please find other resources that may be helpful in this process.

Basic Description of Strategic Planning

http://managementhelp.org/plan_dec/str_plan/basics.htm

Information on SWOT Analysis

http://www.mindtools.com/pages/article/newTMC_05.htm

Example of Strategic Planning in a Student Association

<http://www.su.ualberta.ca/about/strategicplan/strategicplandraft.pdf>

A summary of the Strategic Planning Process used by the Students' Union

<http://www.su.ualberta.ca/about/strategicplan/>

