



**Strategic
Planning
Creating a Plan
that Works
Webinar
January 20, 2011**



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**What You'll Leave With –
I Hope**

- ✓ Confidence and motivation to undertake a successful strategic plan



What You'll Learn

- ✓ What it is and why bother
- ✓ A process for success
- ✓ Confirm/revise mission, vision and values
- ✓ Learn about your environment
- ✓ Set direction, create a plan and measure its progress



Exercise One

Provide one word or phrase
that describes strategic
planning



What is Strategic Planning?

- ✓ Future oriented
- ✓ Sets direction
- ✓ Broad based
- ✓ Analytic



What is Strategic Planning?

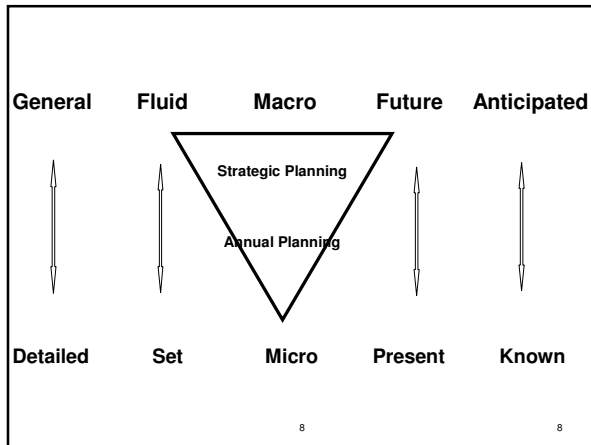
- Creative process....
- ✓ Intuition and analysis
- ✓ Intelligent questions
 - ✓ Possibilities
- ✓ Feasible alternatives
- ✓ Rigorous debate



What is Strategic Planning?

It should disrupt the normal course of activities.





Why do it?

“Even if you are on the right track, you’ll get run over if you just sit there?”

Will Rogers

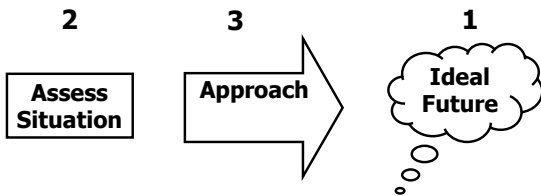


Why do it?

- ✓ Explore alternatives
 - ✓ Anticipate
- ✓ Manage change
- ✓ Make hard choices
 - ✓ Focus
 - ✓ Align

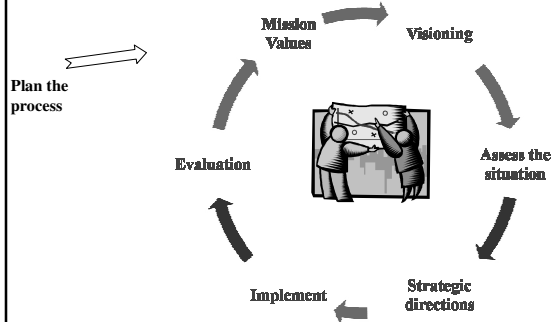


Key Components



11

Strategic Planning Components



12

Process Steps

- 1. Purpose
- 2. Ground rules
- 3. Participants
- 4. Work plan
- 5. Communication
- 6. Resistance



Who Participates

People will support what they help to create



Who Participates

Distinguish between *involved and engaged*



Exercise Two

Identify creative ways to involve stakeholders in your strategic plan



(1) Component: Mission

✓ Describes what you do, for whom and how

✓ *Is it succinct, compelling, relevant?*



(2) Component: Values

✓ Heart of the culture

✓ Operationalized

✓ Help with competing choices



(3) Component: Vision

- ✓ Open thinking to possibilities
 - ✓ Stretch but plausible
 - ✓ Rallying cry
 - ✓ Help make choices



**(4) Component:
External and Internal Review**

- ✓ Generates concrete information that stimulates thinking and uncovers insights, opportunities and issues

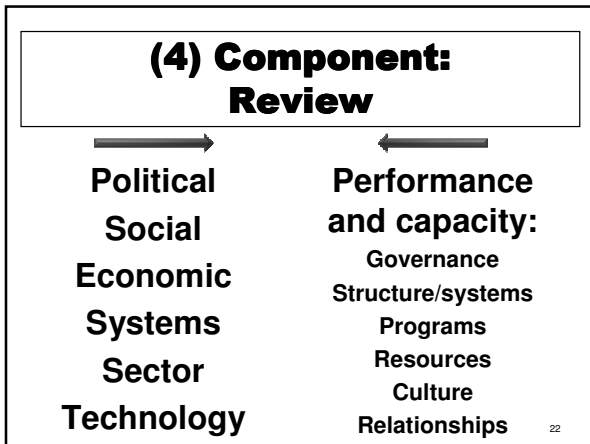


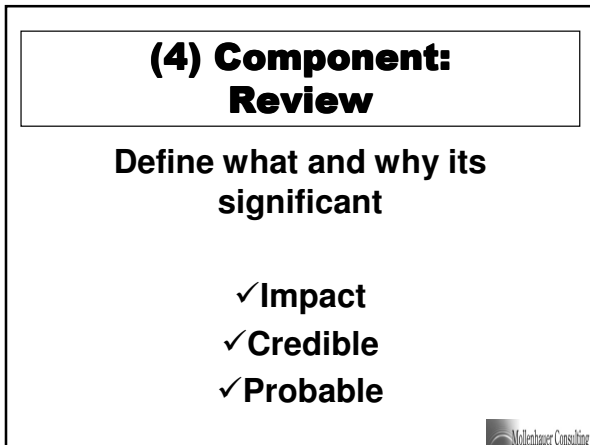
**(4) Component:
Review**

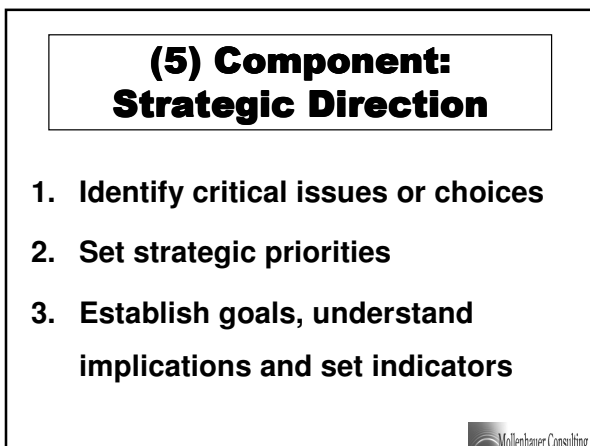
“It wasn’t raining when Noah built the ark”

Richard Cushing









**(5) Component: Strategic Direction
– Issues/Choices**

- ✓ Ask questions
- ✓ Generate insights
- ✓ Consider alternatives
- ✓ Think about pros/cons
 - ✓ Cluster
 - ✓ Prioritize



Exercise Three

**Describe a critical issue or
choice**



**(5) Component: Strategic Direction
– Set Direction**

- ✓ Turn into directional
statements
- ✓ Prioritize based on agreed to
criteria



**(5) Component: Strategic Direction
– Goals, Implications and
Indicators**

- ✓ Concrete, measurable and attainable
 - ✓ Impacts on resources, delivery, structure and processes
- ✓ Answer – how will we know it is being achieved



**(6) Component:
Implementation**

- ✓ How, what and who
- ✓ Integrate, not stand-alone
- ✓ Ensure staff buy-in



**(7) Component:
Evaluation**

Evaluation will succeed if:

- ✓ *Specific*
- ✓ *Measurable*
- ✓ *Feasible*



**(7) Component:
Evaluation**

- ❖ *What is to be measured*
- ❖ *How it will be measured*
 - ❖ *By whom*
 - ❖ *For whom*
- ❖ *To what purpose*



Critical Success Factors

- ✓ Participation = ownership = accountability
- ✓ Build from a shared vision
- ✓ Balance dreams and feasibility
- ✓ Challenge, debate
- ✓ Don't take three years or a weekend
- ✓ Design it to be used



“It is often more comfortable for organizations to put out fires on a daily basis, than to design an organization to be less flammable.”



Strategic Planning Toolkit
*developed with Canadian Mental Health Ontario
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