

Strategic Planning & Your Club



Practical Tips on Getting it Done
... And Using It!

Fall Leadership Conference 2007



What Is Strategic Planning?

- Producing decisions & actions that shape & guide what an organization is, what it does, & why it does it, with a focus on the future.

Bryson's Strategic Planning in Public and Nonprofit Organizations

- Answers the question, “In pursuit of our mission, & in light of our shared values & knowledge of ourselves & our environment, what should we be doing?”

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What Isn't It?

- Rocket science
- Effortless
- Short-term
- Solely about the future

It is...

*...about what you do now in order
to *affect future results**



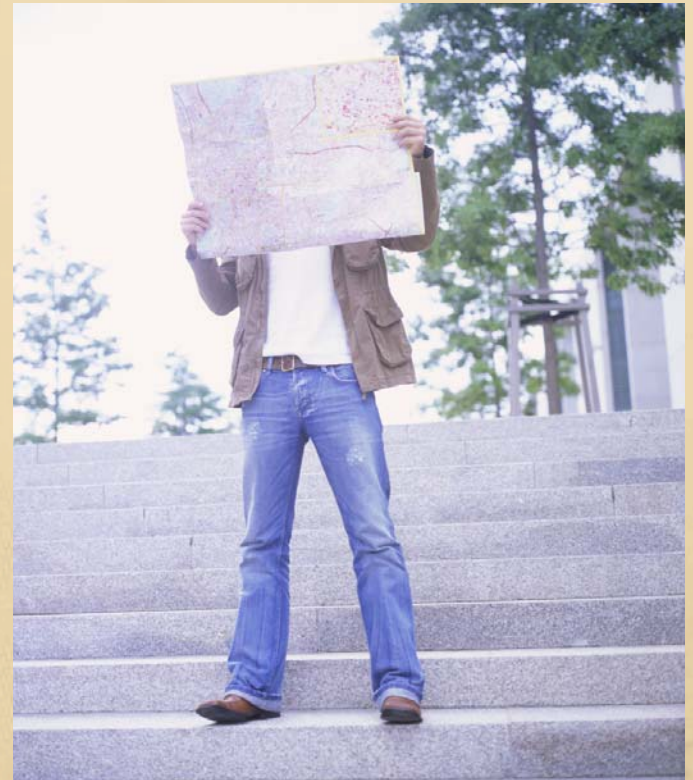
Good Strategic Planning...

- Builds a shared vision
- Creates a basis for taking action
- Pays attention to external factors/
environment
- Is based on solid data, not just gut
feelings
- Questions the status quo



Why Should Clubs Bother?

- “Failing to plan = planning to fail.”
- You need a destination to be able to create a road map
- *If you don't have either, how will you know if the trips you're taking will get you where you want to end up?*





Benefits

- **A strategic plan allows a club to:**
 - ❑ **chart out its year**
 - choose among project & recruiting opportunities
 - timing – manageability, impact & cumulative effect
 - ❑ **allocate resources**
 - financial
 - human
 - ❑ **set goals for fundraising, membership, etc. & determine if they can be met through the chosen actions**
 - ❑ **build consensus on future direction**



The Basics



The Steps

- **Establish vision & mission**
 - 'futures thinking'
- **Set goals, specific objectives**
- **Analyze positioning and challenges**
- **Develop strategies and tactics**
- **Develop & execute implementation plan, tasks**
- **Evaluate; adjust as needed**



Getting Started

- **Visioning can be the trickiest part**
 - ❑ be open minded & honest
 - ❑ start from square one on why the club exists
 - ❑ attach a reasonable level of detail to what the next 3/5/10 years should/could look like
- **Needs to be a solid starting point, but the details don't have to be perfect to start**
- **Don't be afraid to get outside help & perspectives**
- **See it through**



SWOT Analysis

Internal	External	Comments
Strengths	Opportunities	<i>How can we take advantage of each?</i>
Weaknesses	Threats	<i>How can we overcome them?</i>



Strategic Structure





Tactical Elements

Achieve sustainability:

➤ **Increase membership levels**

□ **Increase member retention rates**

• **Improved and consistent product**

- Positive, nurturing, rewarding & welcoming club culture
- Effective service work & meetings that keep members engaged

• **Improved Value Proposition**

- Solid ROI of volunteer time & effort; positive experience
- Better training and personal development programs
- More 'benefits of membership' through economies of scale
- Streamlined admin. that minimizes volunteer burden



Summary

- Don't bite off more than you can chew
- Be inclusive
- Express the vision clearly to all involved
- Be creative – don't be limited by '*we've always done it this way*' thinking
- Don't try to eliminate all risk
- Use the road map to systematically plot actions
- Revisit often to ensure effectiveness
- Be persistent – just do it!



Questions & Comments