

Strategic Planning Overview

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Envision

Plan

& Act

Vision

Mission

Values

Strengths
Weaknesses
Opportunities
Threats

Strategic Goal
Objectives
Assignments

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Objectives
Assignments

Success Factors

Barriers

Action Plan

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Success Factors

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Strategic
Plan
Presenta-
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Strategic
Goal
Tracking

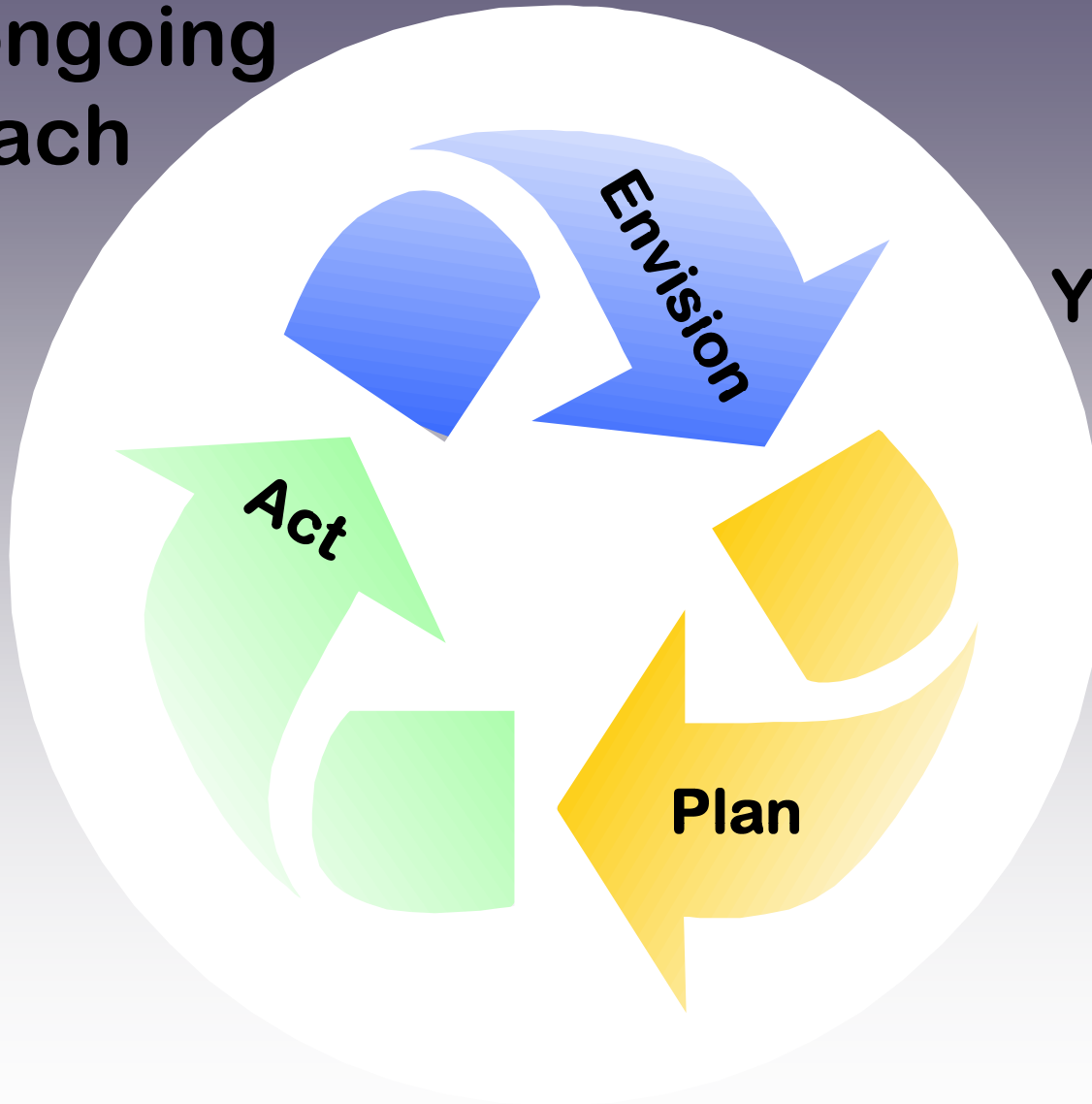
Acting

Quarterly
Reviews

Revising

Envision Plan & Act - Phases

**Envision Plan & Act
is an ongoing
approach**



**You envision
plan & act,
then you
envision,
plan & act**

Why is Strategic Planning Important?

A vision without a plan is just a dream.

A plan without a vision is just drudgery.

A vision and plan without action is just a disappointment.

But a vision with a plan put into action can change the world.

Envision

Vision	<p>A picture of the “preferred future”; a statement that describes how the future will look if the organization achieves its ultimate aims.</p> <p><i>“Every child and youth has a loving, safe and permanent family.”</i></p>
Mission	<p>A statement of the overall purpose of an organization. Describes what you do, for whom you do it and the benefit.</p> <p><i>“We transform the lives of children in foster care by building and nurturing permanent families”</i></p>
Values	<p>A most elusive word, values are not what an organization does or why it does what it does, but rather the principles that underlie and guide how it goes about fulfilling its mission and vision.</p> <p><i>“Child/Youth Focus, Ethical, Leadership, Collaboration, Team Work, Diversity, Stability, Customer Service”</i></p> <p><i>“Responsiveness to consumer needs will be a first priority in our operations. Therefore we will...”</i></p>

Envision

SWOT

Significant Internal Conditions

Internal environmental factors having a potential impact on the organization as it advances its mission and vision. These factors are internal strengths and weaknesses.

*“**Strengths:** Strong and active board, Committed staff, Recognizable brand and image”*

*“**Weaknesses:** Limited in-home support, No wraparound options, Limited mental health services”*

Significant External Conditions

External environmental factors having a potential impact on the organization as it advances its mission and vision. These were identified as opportunities and threats

*“**Opportunities:** Medi-Cal funding for sustaining placements by providing a variety of effective Mental Health Services, To provide neighborhood-based services”*

*“**Threats:** Redesign stretching us beyond our abilities and resources, State & County recruiting our staff”*

Plan

Strategic Goals	<p>Broad, long-term aims that define accomplishment of the mission and vision. These are the key steps to achieve your ends. It is capable of galvanizing commitment from the organization and senior sponsorship.</p> <p><i>“EXPAND FAMILY RECRUITMENT INITIATIVE.”</i></p>
Objectives <ul style="list-style-type: none">•SPECIFIC•MEASURABLE•ACHIEVABLE•RELEVANT•TIME-BOUND	<p>Specific, quantifiable, realistic targets that measure the accomplishment of a strategic goal over a specified period of time.</p> <p><i>“By January 31, 2008 we will expand family recruitment program to increase diversity of families by 20% and to increase by 15% number of families available to adopt children of color, older children, children with disabilities emotional, physical & developmental, sibling groups and children with concurrent plans.”</i></p>
Assignment (leader, team)	<p>Identify who will be responsible for ensuring the achievement of the strategic goal.</p> <p><i>“Program Director and Chief Operating Officer</i></p>

Plan

Next Steps

The next actions to take in the planning process.

“1. Prepare First Draft of Plan by Feb 06, 2006”

“2. Present Mission, Vision, Values to Board on Feb 24, 2006 board meeting”

“3. Next Strategic Planning Meeting, work on final draft on Feb 24, 2006 2:00pm to 5:00pm”

Bench- marks

To ensure that the Strategic Plan and the vision defined will be implemented in its totality, a time line of activities and periodic assessments will be carried out by Management and progress reported to the Board. The benchmarks are as follows:

“1. Management Staff will prepare Action Plans to achieve Strategic Goals outlined in the Strategic Plan. These Plans shall be presented to Board for review and comment at the May 2006 Board meetings.”

“2. Management Staff will prepare Operational Plans to implement the mission and vision outlined in the Strategic Plan. These Plans shall be presented to Board for review and comment by May 2006.”

“3. Board Management Committee reviews progress on Strategic Goals quarterly and reports at following Board meeting ongoingly”.

Do the objectives measure results and not just activity?

Objective Verbs

- Increase
- Reduce
- Achieve
- Maintain
- Have

Strategy Verbs

- Establish
- Develop
- Implement
- Revise
- Utilize

Act

Critical Success Factors	<p>Major items or issues that must "go right" to achieve one or more objectives.</p> <p><i>"Hire bilingual recruiting staff, recruit in ethnic neighborhoods, have culturally sensitive recruiting practices."</i></p>
Barriers	<p>Existing or potential challenges that hinder the achievement of one or more objectives.</p> <p><i>"Existing belief systems, staff resources"</i></p>
Strategies	<p>Broad activities required to achieve an objective, control a critical success factor, or overcome a barrier.</p> <p><i>"Monthly recruiting events in Spanish held at local churches in the Hispanic community."</i></p>
Action	<p>Specific steps to be taken, by whom and by when, to implement a strategy to achieve a strategic goal.</p> <p><i>"Monthly recruiting events in Spanish held at local churches in the Hispanic community."</i></p>

Act Plan

Envision Plan & Act

Action Plan for Strategic Goal

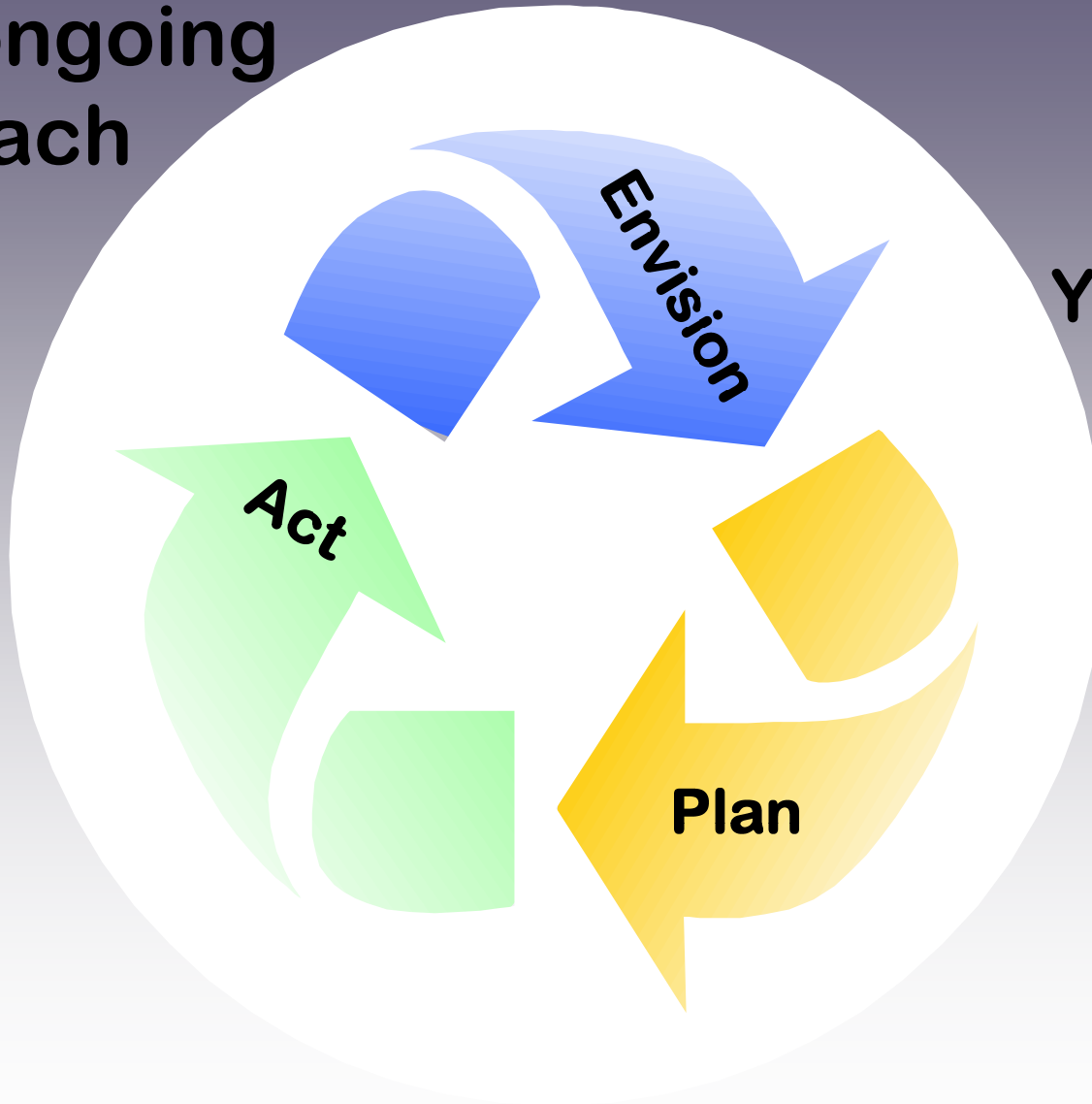
SG Title	SG07. EXPAND FAMILY RECRUITMENT INITIATIVE	
Strategic Goal	We will expand family recruitment program to increase diversity of families by 20% and to increase by 15% number of families available to adopt children of color, older children, children with disabilities emotional, physical & developmental, sibling groups and children with concurrent plans.	Coordinator Program Director
Objectives	Over the next 18 months SAS will expand family recruitment program to increase diversity of families by 20% and to increase by 15% number of families available to adopt children of color, older children, children with disabilities emotional, physical & developmental, sibling groups and children with concurrent plans.	Team Chief Operating Officer, Family Recruiters
Due	1/31/2008	Overall Status On Target
Barriers	Existing belief systems, staff resources	Critical Success Factors Hire bilingual recruiting staff, recruit in ethnic neighborhoods, have culturally sensitive recruiting practices
Strategies	Monthly recruiting events in Spanish held at local churches in the Hispanic community	

#	Action Steps	Coordinator	Est Time Required	Due	Status
1	Create Job Description Bilingual Recruiter	Prog Dir.	4 hrs	9/30/2006	Not Started
2	Advertise for Job Opening	Prog Dir.	2 hrs	9/30/2006	Not Started
3	Interview Respondents	Prog Dir., COO	12 hrs	10/30/2006	Not Started
4	Select Bilingual Recruiter & Make Offer	Prog Dir., COO	4 hrs	11/15/2006	Not Started
5	Training Bilingual Recruiter	Prog Dir. Recruiting Staff	32 hrs	1/1/2007	Not Started
6	Kickoff Monthly Recruiting events at local Church in Spanish	Bilingual Recruiter, Prog Dir	4 hrs	2/1/2007	Not Started
7	Follow up on prospective families	Bilingual Recruiter	20 hrs a month	month until Jan 2008	Not Started
8	Start reporting on diversity of families	Bilingual Recruiter	4 hrs a month	month until Jan 2008	Not Started
9	Monthly Reviews of Program	Recruiter, Prog Dir	2 hrs a month	month until Jan 2008	Not Started
10	Re-evaluate Program	Prog Dir., COO	8 hrs	1/1/2008	Not Started

Act

Communication Plan	The plan on how to communicate the strategic plan to stakeholders (staff, customers, vendors, volunteers, etc.)
Strategic Goal Tracking	<ul style="list-style-type: none">•The structured review involves:•Assessing progress on strategic goals•Grading the current and projected performance against the objectives•Identifying changes in the environment, new barriers, additional critical success factors•Making adjustments to the objectives•Re-establishing priorities for strategies, removing strategies and adding new strategies as needed

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