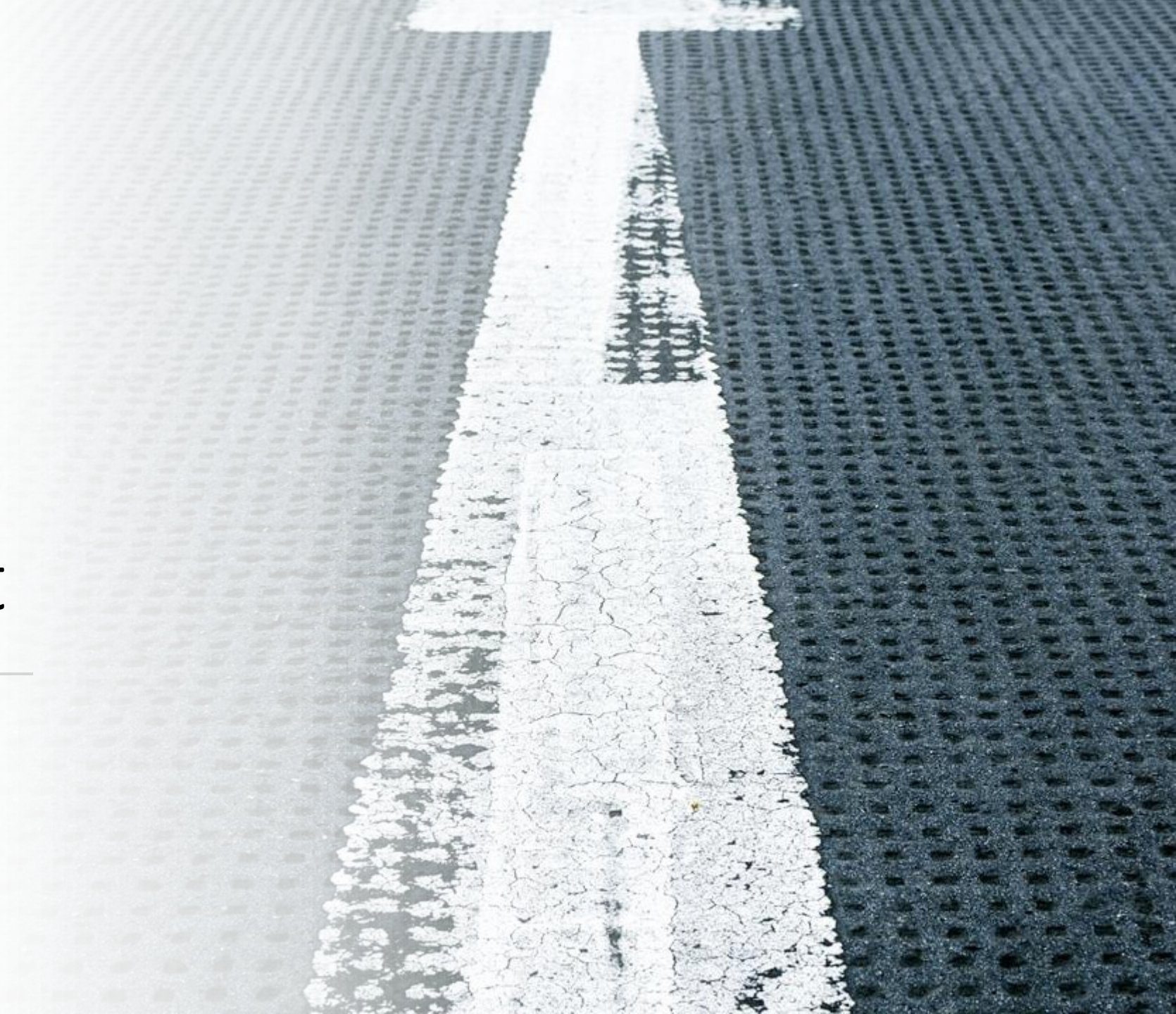




Using Your Strategic Plan to Maximise Positive Impact

Speaker: Belinda Moore





You do not exist to recruit or
retain members.

You exist to make a positive
impact for those you serve.




Great planning ensures you
achieve this.

High performing associations ...

- Create a compelling shared vision of the future.
- Convert that vision into a strategic plan (a Roadmap to that Future), and
- Operationalise that strategy effectively.





“If you don't know where you are going, any road will get you there.”

Lewis Carroll



Strategic Planning is Evolving ...


- Functional -> Impact.
- Large -> Succinct.
- 5 year -> 3 year.
- Rigid -> Flexible.
- Workshop -> Process.
- Face-to-Face -> Online.
- Presentation -> Discussion.




Every strategic plan is different

- For volunteer-run associations it may be simple enough to also be the operational strategy.
- For more complex organisations it is the foundation upon which a detailed operational plan can be developed.






Planning for an association requires an understanding of the operating environment of your sector and the association sector.




The Operational Landscape is Shifting ...

- Technological.
- Competition.
- Generational.
- Work & lifestyle.
- Ease of connection.
- Many communication channels.
- Communities & tribes.
- COVID-19.





Don't ask people what they want.
Understanding what they need.




What keeps your members up at
night? How can you solve these
problems?


Choose functions that create impact.

- Mobilisation.
- Representation.
- Participation.
- Service Provision.
- Community.






Planning must also ensure you are
maintaining a sustainable
organisation that is operationally
positioned to create an impact.




Enablers include:

- Leadership
- Governance
- Technology
- Business & membership models.
- Value proposition
- Communications.
- Stakeholder engagement.
- Components structures.
- Skilled staff and volunteers
- Organisational culture.
- Revenue diversity.
- Business development.





Business, membership, and
component frameworks must align
to your purpose and functions.



Business, membership, and component models are evolving.


- Traditional -> contemporary models.
- Alignment of models to purpose & function.
- Community as a competitive advantage.
- “Creator/distributor” to “facilitator/platform”.






No “one-size-fits all”
model exists.





Great strategies are NOT created by showing up on a random day with a blank sheet of paper.



Planning is a process that helps you **FOCUS** on where you can make the most positive **IMPACT** on your **PURPOSE.**


Strategic Plan Inclusions:

1. **Timeframe** – A specific timeframe for the plan.
2. **Vision** – An inspirational and concise statement about the positive outcome for those your serve if all your work was successful. Eg: A world without Alzheimer's disease (Alzheimer's Association).
3. **Purpose** – A simple statement outlining why you exist and how you will reach your vision. Eg: We look after doctors so they can look after you (British Medical Association).
4. **Strategic Objectives** (Priorities or Outcomes). Two-three specific outcomes you will achieve to advance your purpose.
5. **Strategies** (Goals or Projects). Underneath each objective list the 3-6 specific ways you will advance each objective.
6. **Enablers** – Projects that will ensure the organisation is operationally positioned to deliver on the strategy.




Strategy On-A-Page Template

TIMEFRAME	What is the duration of the plan?		
VISION	What is your vision of the future if everything you do is successful?		
PURPOSE	Why do you exist? What do you do and for whom?		
STRATEGIC OBJECTIVES	Objective 1 – What will you achieve on behalf of those you serve?	Objective 2 – What will you achieve on behalf of those you serve?	Objective 3 – What will you achieve on behalf of those you serve?
STRATEGIES	1.1 Strategy 1.2 Strategy 1.3 Strategy	2.1 Strategy 2.2 Strategy 2.3 Strategy	3.1 Strategy 3.2 Strategy 3.3 Strategy
ENABLERS	4.1 Strategy/Project 4.2 Strategy/Project 4.3 Strategy/Project		



Use a facilitator who is engaging enough to keep people engaged – but firm enough to keep them focused and moving forward.



Questions?



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Strategic Planning Process:

Step 1: Plan Your Process

1. **Output.** What is your preferred format for your strategy-on-a-page?
2. **Outcomes.** Other than the strategy, are there any other outcomes we need to achieve?
3. **Logistics.** Will the process be entirely online, or will there be face to face elements?
4. **Consultation.** Is consultation required? If so, who needs to be engaged in the process and how?
5. **Process.** What steps are involved in the process? What are the proposed dates and timing? Who needs to be a part of each step?
6. **Issues.** Are there any issues or challenges that must be addressed during this process?

Strategic Planning Process:

Step 2: Undertake Consultation

Consultation can be as complex a full stakeholder engagement process or as simple as getting all workshop participants to respond to a list of questions.

From this process we are seeking to understand things such as:

- Who do we serve?
- What are the biggest positive impacts we could have on those we serve over the duration of this plan?
- How can we ensure the we are operationally positioned to deliver?
- What are the biggest barriers to our success?

Strategic Planning Process:

Step 3: Create a Draft Strategy

- A robust consultation process will enable you to develop an evidence-based draft strategy.
- This “strawman” provides an excellent starting point for your Strategic Planning workshop.
- This draft may take several sessions and involve different groups to create and validate.

Strategic Planning Process:

Step 4: Issue the Agenda.

Your papers for your strategic planning workshop should include:

- Agenda,
- Draft Strategy,
- Supporting Documentation, and
- Other pre-reading.

These will all be taken “as read” on the day.

Strategic Planning Process:

Step 5: Run the Workshop.

A large group of people together is a significant investment of time. Do not waste their time with activities that should be done beforehand. Eg: SWOT analysis.

- **Quickly set the context and tone** – If not already done during the processes, a succinct high level trends presentation.
- **Use a robust discussion format** – Work through the draft strategy from top to bottom. If online, encourage use of the chat.
- **Keep discussions focused** – Regularly take quick votes to narrow discussion and avoid tangents.
- **Keep it realistic** – Before finalising the plan discuss any barriers to success and where it is achievable.
- **Agree next steps** – Clarify next steps. Generally this is to agree the strategy and pass to the staff team for operationalisation.

Strategic Planning Process:

Step 6: Operationalise Your Plan

Once your workshop is complete you are ready to operationalise the plan. This includes:

- Developing measurable, time-dependent KPIs.
- Creating succinct Board and staff reporting format that informs operational and strategic decision making.
- Develop an operational plan and budgets – use this opportunity to generate cross-functional engagement.
- Schedule your review points.

Focus on impact.

- To proactively influence the industry agenda.
- To facilitate pre-competitive collective action within the industry.
- To facilitate more efficient transactions between all parties in our industry.
- To create a strong pathways into and within the profession.
- To foster a well trained and highly skilled profession.
- To ensure an adequate supply of professionals into the industry.
- To ensure professionals have access to the tools, insights, and support needed to be successful.
- To be the independent voice for users navigating a complex digital world.
- To be a strong voice for the profession.
- To operate a sustainable, efficient, and effective organisation.

