An Overview of Strategic Planning
Jefferson County Administrative Committee
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Context for Strategic Planning

- Determine what is of most importance and what to do about it.
- Strategic Planning is about “the organization”.
- Customize the approach with a “plan for the plan”.
Overview of strategic planning process

- Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide an organization and what it does.
- It’s a powerful tool that helps organizations figure out what’s really important and what to do about it.

Adapted from Bryson, etc.

Plan for planning

Mandates

External assessment

Internal assessment

Values & mission

Strategic issues

Strategy formulation

Plan Management
  - adoption
  - implementation
  - reassessment/monitor

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Strategic Planning Program
Step 1: Plan for Planning

- Diagnose organization’s situation and readiness to plan.
- Develop the plan process, people to involve, process steps, etc.
Stakeholder Analysis

- People to involve and consider.
- Those affected by or who have an effect on the plan.
- External and internal.
Step 2: Mandates

- Formal – codified.
- Informal – community expectations.
- Informal may be embodied in norms and expectations of key stakeholders.
Step 3
Developing a Mission
Mission Statement

- **Mission** = what an organization does.
- **Values** = what an organization believes, reflected in how it acts.
- **Vision** = what an organization wants to be in the future.
What is a Mission Statement?

- Purpose of the organization
- Its core function.
- The organization’s reason for being – the “work” of the organization.
- What the organization does uniquely well.
- Mission/purpose should define the organization’s intentions toward the clientele it serves.
Mission Statements Are Used To…

- Align what the organization says it does with what it actually does
- Align what the world believes it does with what it actually does
- Provide grounding for key decisions
Mission: Final Thoughts

- Similar to “purpose”

- Concisely explains **WHAT** the organization does and a bit of why

- It is important to periodically review and reflect on the mission statement
Step 4
Assessments
Assessments

- **Purpose for Assessing the Environment**
  - The purpose of Step 4 is to provide information on the organization’s strengths and weaknesses in relation to the opportunities and challenges it faces.
  - This step lays the foundation for identifying issues and effective strategies.
  - The distinction between internal and external is fluid. Don’t worry if distinctions are properly made.
Assessments

- **Purpose for Assessing the Environment**
  - This exercise alerts an organization or community to conditions that may require a response.
  - It provides a “systems view” of clues and prompts for possible issues, vision ideas and strategies.
Assessments

❖ Outputs and Tools

- Four lists comprise the classic Strengths, Weaknesses, Opportunities and Challenges (S.W.O.C.) Analysis

  - Strengths
  - Weaknesses} Internal (past and present)

  - Opportunities/Hopes
  - Challenges} External (future)
Assessments

- External Assessments: Areas to Monitor
  - PESTs (Political, Environmental, Social, Technological, etc.)
  - Selective and appropriate prompting when facilitating
Assessments

- Internal Assessments: Areas to Monitor

  - A simple systems approach:
    - Internal resources and capabilities (Inputs)
    - Current internal strategies (Processes)
    - Internal performance (Outputs)
STEP 5
Identifying Strategic Issues:
The Heart of Strategic Planning
Identifying Strategic Issues

- All the data generated and process has led to this point.

- The issues identified during this step represent those the organization believes will significantly affect its future.
A **Strategic Issue** is...

- a fundamental challenge affecting the organization.
- Is different than an *‘operational’ issue.*
An **Operational Issue**...

- Is likely to confront the organization sooner rather than later and is more routine.

- if not addressed, will **not** significantly affect major organizational features such as mission, product or service mix, etc.
Characteristics of Strategic Issues

- Extensive impact on key stakeholders.
- Is responsive to mission.
- Extensive implications as suggested by the "assessments".
- Significant consequences to the organization if not addressed.
- There is an ability to do something about the issue.
Benefits of Identifying Strategic Issues

- Attention is focused on what is most important.
- Attention is focused on issues.
- Identification of issues creates useful tension needed to prompt organizational change.
- Provides useful clues on how to resolve issues.
- The strategic planning process becomes “real” at this point.
Step 6
Strategy Formulation
Definition of a Strategy

- Is a pattern of purposes, policies, actions, decisions, and/or resource allocations that address a strategic issue.
Purpose of Step

- To create a set of strategies for each strategic issue that has been identified in Step 5-Strategic Issues.
What are some practical alternatives or initiatives that we might pursue to address this issue?

What are the key actions that must be taken to implement the major initiatives?
Strategy Formulation

- What are the specific steps and who would be responsible for these actions?

- In selecting strategy, it is important to understand the feasibility and capability of actually carrying out the strategy idea.
Follow-Up Resources

- University of Wisconsin-Extension: Community, Natural Resource and Economic Development Programs and County Offices
  - [http://www.uwex.edu/ces/cnred/](http://www.uwex.edu/ces/cnred/)
  - [http://www.uwex.edu/ces/cty/](http://www.uwex.edu/ces/cty/)