

# Developing and Implementing a Strategic Plan

**PRESENTED BY:**

**Josh Simmons**

**Collaborative Strategist / Consultant / Attorney**

**[www.Prospersustainably.com](http://www.Prospersustainably.com)**

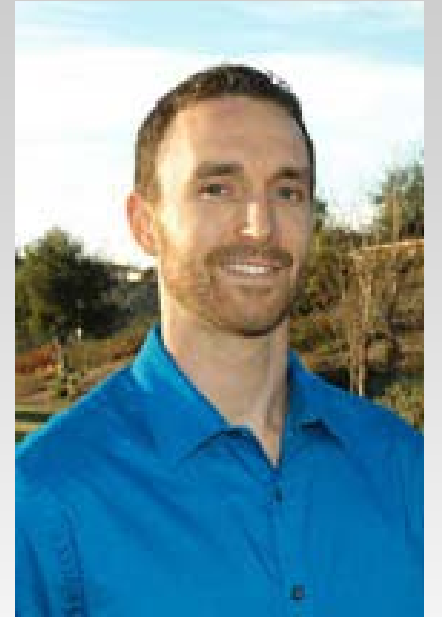
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# Presenter Introduction

## Joshua M. Simmons

- **Founding President of Prosper Sustainably**
  - Assists individuals & organizations clarify, pursue, and fulfill unique potential through various consulting and legal services
- **Former SYCEO Director (2007 – 2014)**
  - Transformed the Santa Ynez Chumash Environmental Office (SYCEO) into a nation leading tribal environmental agency
  - Secured 42 grants for \$4.3 million in funding
  - Grew from 2 to 20+ programs, 1 to 15 staff members
- **Training Instructor / University Lecturer**
  - On behalf of ITEP, FWS, USBR, UCSB, ITCA, etc.



# Strategic Planning Experience

- **Development of Strategic Plan & Strategic Work Plan (2015)**
  - Pala Band of Mission Indians Environmental Department
  - La Jolla Band of Luiseño Indians Environmental Protection Office
- **Development of Strategic Plan (2014)**
  - Rincon Band of Luiseño Indians Environmental Department
- **Strategic Planning Retreat Facilitator (2015)**
  - Santa Barbara Channelkeeper
- **Departmental Strategic Planning (2009-2014)**
  - Santa Ynez Chumash Environmental Office
- **Ongoing Personal Strategic Planning (2010 – present)**

# Webinar Objectives

- **Overview and importance of strategic planning & management**
- **Strategic plan development**
  - **Mission, Vision, Values, Goals, S.W.O.T.**
  - **Strategic Work Plan – Objectives, Performance Metrics, etc.**
- **Strategic plan implementation**
- **Strategic planning & management approaches, tools, resources**
- **Why and how to develop a “living” strategic plan**
  - **Justification for ongoing strategic planning & management efforts**
- **Strategic planning & management and the human element**



# LACKS MISSION & VISION

“Would you tell me, please, which way I ought to go from here?”

“That depends a good deal on where you want to get to.”

“I don't much care where –”

“Then it doesn't matter which way you go.”

— *Lewis Carroll, Alice in Wonderland*

Don't be that girl!





# LACKS STRATEGY / PLAN

Don't be that guy!



"I've seen you drive by five times, do you want directions?"

"No, I'm pretty sure I know where it's at."

"You sure? I know this place very well..."

"Nah, this looks familiar. I think it's just a few more blocks. I'll get there."

— *Random Stubborn Gingerbread Man*

# HAS AN ADAPTABLE STRATEGIC PLAN



Be this person!



# Mission, Vision, Values

- **Mission = Purpose of Organization (clear and concise)**
  - Guides decisions about priorities, activities, roles, responsibilities, etc.
- **Vision = Ultimate State of Success**
  - Can be tied to the organization or change(s) in the world (or both)
- **Values = Beliefs that Guide Behavior**
  - How things are done around here

**Prosper's MISSION is to help individuals, organizations, and communities clarify, pursue, and fulfill their unique potential.**

**Prosper's VISION is widespread empowerment, harmony, and genuineness throughout the world, as a result of the majority of individuals, organizations, and communities taking meaningful steps toward fulfilling their unique potential.**





# S.W.O.T. Analysis

Strengths – what your organization does well

Weaknesses – where your organization can improve

Opportunities – positive external circumstances

Threats – negative external circumstances

# Goals & Program Areas

- **Overall Organizational Goals**
  - Guides the organization as a whole
- **Defining Strategic Plan Program Areas**
  - AKA Business, Functional, or Operational Units; Divisions; Areas; etc.
  - Want to cover all aspects of an organization, including administrative
- **Examples**
  - Development, Marketing, Financial Management, Solid Waste Management, CSR, Employee Development, Outreach
- **Program Area Goals**
  - Guides each program area

# Strategic Work Plan

## ➤ Function of Strategic Plan

- Provides overall direction and guides decision making
- Evaluate issues, opportunities, needs, and objectives

## ➤ Function of Strategic Work Plan

- Blueprint for implementing the Strategic Plan
  - Provides specific direction and guidance by program area
- Establishes all major objectives within specific timeframes
- Track and measure progress, performance, and achievements
- Understand and allocate resources (financial, human, etc.)
- Oversee all organizational activities and adjust direction as needed
- Level of detail / specificity will vary

# Strategic Work Plan Elements (by Program Area)

- Objectives / Milestones\*
  - Include and keep track of “possible” objectives
- Timeframe, Due Dates\*
- Performance Metrics
- Outputs / Deliverables
- Financial Resources
- Personnel Resources
  - Roles and Responsibilities
- Urgency, Status

**\*Essential Elements**

# Strategic Plan Implementation

- **Creating and maintaining a “living” strategic plan & work plan**
  - These should evolve over time as they are put into practice
- **Utilizing and updating the strategic work plan**
  - Develop a perpetual 4-5 year strategic work plan
  - Reviewing and update each program area annually
    - Archive year that just passed; Add a year to the plan; Revise years in between
  - Customize and populate with key information → Run reports
    - Adjust work plan accordingly based on report results
- **Utilizing and updating the strategic plan**
  - Review Mission, Vision, Values, SWOT, and Goals at least annually
  - In-depth review and revision every 4-5 years
  - Ongoing evaluation tool; Ongoing communication

# Plan Development to Implementation

## ➤ Communication

- Results of strategic plan development process
- How the plans will be implemented and utilized
- When and how the plans will be updated
  - Processes for soliciting / receiving ongoing feedback
- New organizational language
  - Mission, Vision, Values, Goals, Objectives, etc.
  - Strategic planning and management terminology

## ➤ Training

- How to utilize the strategic plan and strategic work plan
  - For program direction and management, executive decision-making, etc.
- How to run reports from the strategic work plan
- How to build action plans from the strategic work plan
- How to review/update the strategic plan & work plan



**Prosper**  
**Sustainably**

# Strategic Planning & Management

## Human Element

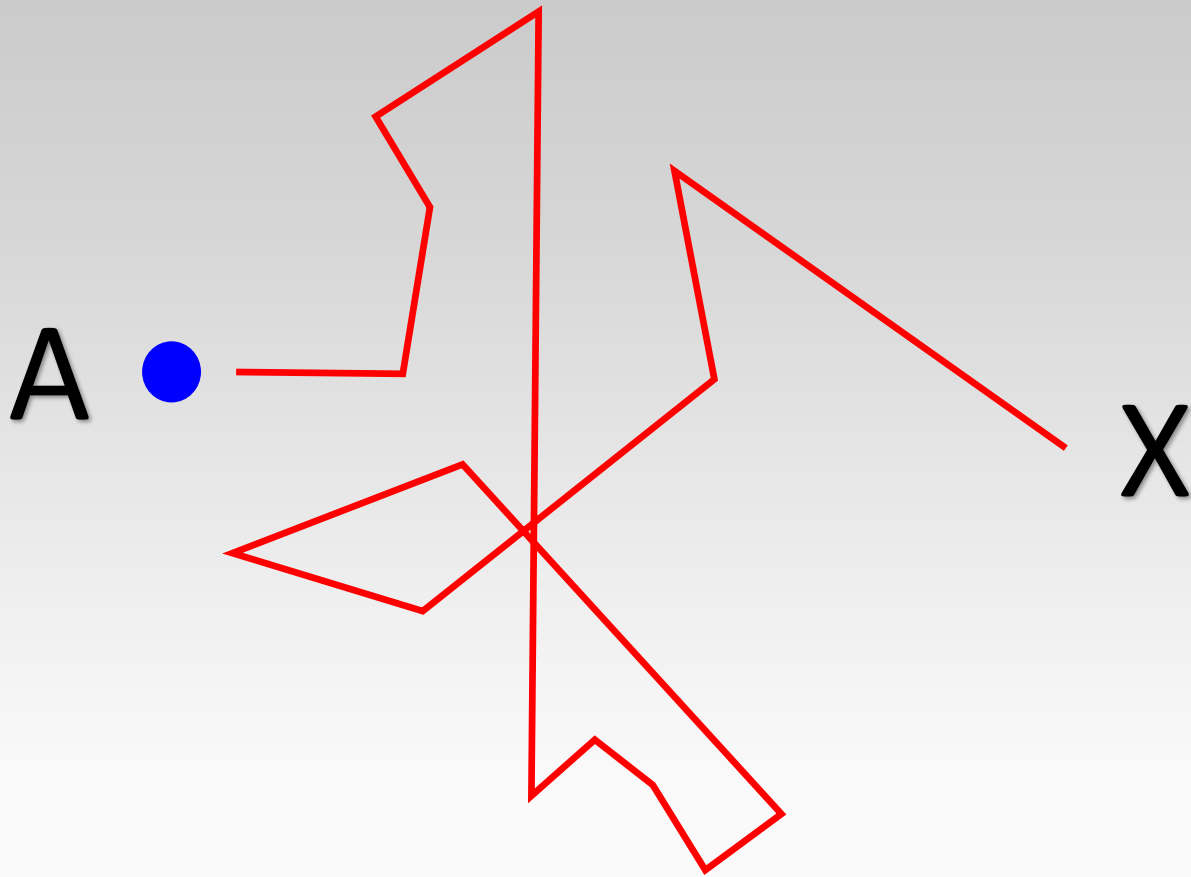
- **Obtain stakeholder input and involvement**
  - Including and especially employees at all levels
  - Create buy-in and alignment, Foster sense of respect and belonging
- **Provide a container for new ideas (and concerns)**
- **Establish a clear and consistent process for evaluating new ideas**
  - In context of mission, vision, values, goals, and other objectives
- **Communicate and model commitment to mission, vision, values**
  - Create a sense of meaning and purpose; May even inspire
- **Clarify direction & expectations (goals, objectives, performance)**
- **Include people, relationship building, and interpersonal matters**
  - Within values, goals, objectives, etc.

# Advanced Strategic Planning & Mgmt

- **Organizational / Program Assessment(s)**
- **Performance Metrics, Performance Evaluation**
- **Gap Analysis & Planning**
- **Change Planning & Management**
- **Risk Assessment, Planning, Management**
- **Cultural Analysis**
- **Action / Program / Initiative Planning**
- **Contingency Planning**
- **Strategy Mapping**



# No Strategic Plan



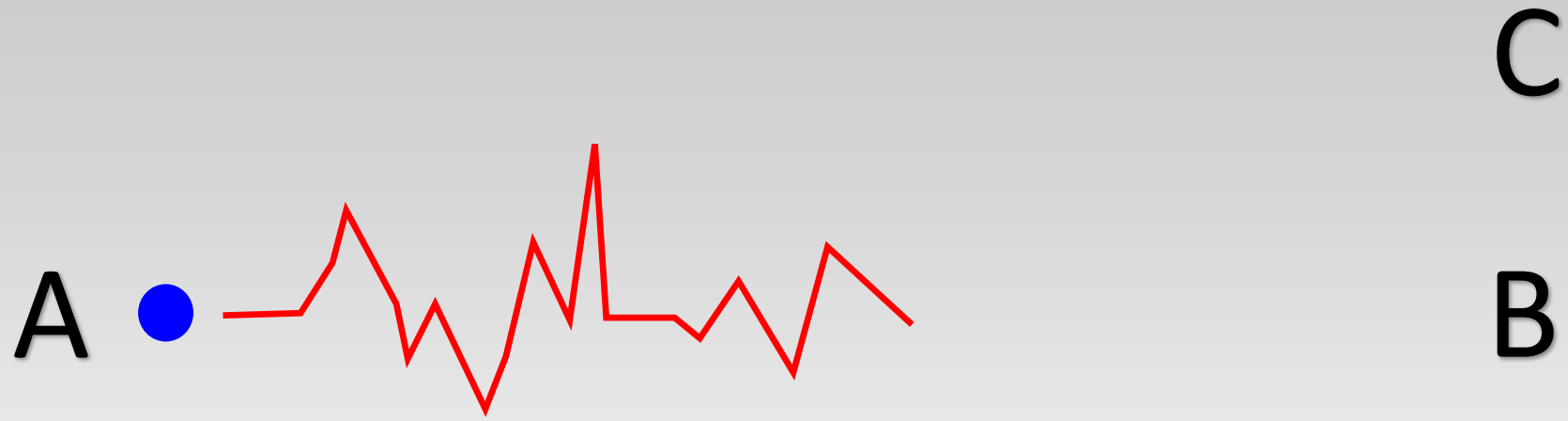
1,200 units of [INSERT RESOURCE] expended

# Has Strategic Plan

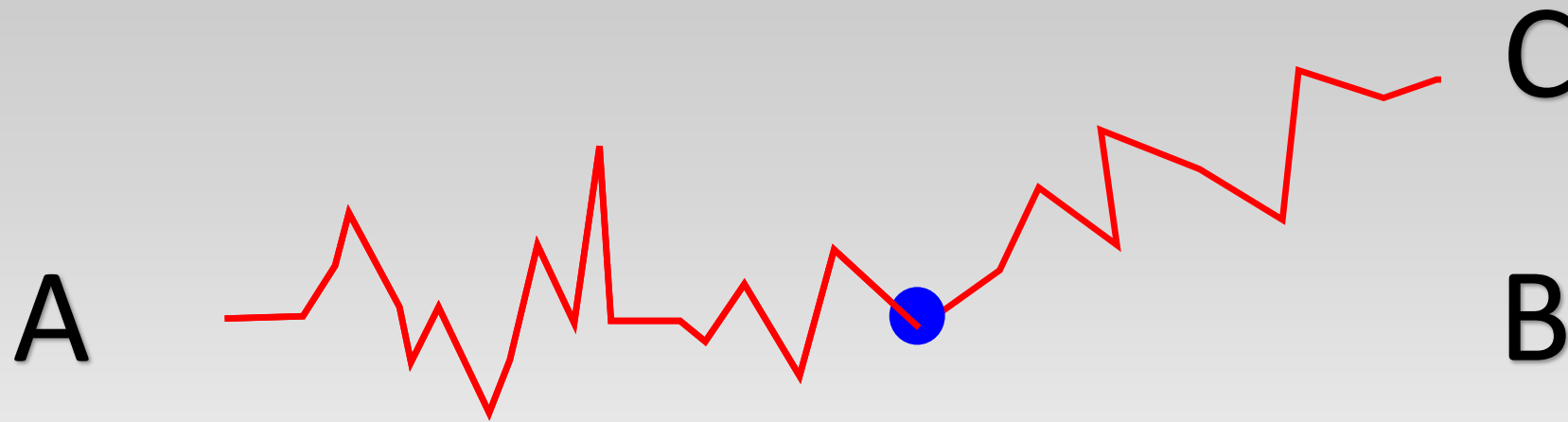


800 units of [INSERT RESOURCE] expended

# Have Living Strategic Plan



# Have Living Strategic Plan



850 units of [INSERT RESOURCE] expended

# How Can Prosper Help?

- **Gather, organize, analyze, and communicate information**
  - Document review, strategic planning retreat, questionnaires, etc.
- **Prepare strategic plan framework; Draft plan based on input**
- **Develop and implement a strategic plan management system**
- **Provide periodic support as need (e.g. for annual updates)**
  - The goal is to help you be self-sufficient in this ongoing process
- **Guide your organization through this process, staying on track**
- **Obtain a fresh, independent, and insightful perspective**
  - Present ideas and options; Identify resources and opportunities
- **Identify and address issues and challenges**

# Prosper Sustainably's Services

- Collaborative Strategic Planning & Management
  - Collaborative Organization Strategy
  - Collaborative Individual Strategy (professional & personal)
- Grant Writing & Grants Management
- Program Development & Project Management
- Feasibility Studies & New Ventures Planning
- Environmental & Sustainability Services, including:
  - Sustainability Evaluation & Planning (“Greening”)
  - Environmental & Land Use Codes Drafting
  - EPA-Tribal Environmental Plans (ETEPs)
- Writing, Speaking, Training



<http://www.prospersustainably.com/services/>

# Thank You! Questions?

[jsimmons@prospersustainably.com](mailto:jsimmons@prospersustainably.com)

(805) 694-8089 (office) / (805) 617-5685 (cell)

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**Your feedback is appreciated**

