



LOCAL CHAPTER STRATEGIC PLANNING

Pennsylvania Phi Beta Lambda

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WHY Strategic Planning?

*If a man knows not what harbor he seeks,
any wind is the right wind. ~ Seneca*

- When running an active organization, it is easy to get caught up in short-term tactics and lose sight of long term goals
 - Particularly in college, as college students have a LOT going on at once
- High turnover in student organizations
 - Strategic planning helps develop vision consistency across multiple generations of leadership



WHY Strategic Planning?

- Increased motivation due to a shared vision and shared goals
- Helps us do a better job by:
 - Analyzing our environment
 - Identifying our strengths and building upon them
 - Identifying our weaknesses and improving them
 - Focusing our efforts on certain areas
- At the very least:
 - We are a professional student organization
 - All businesses do this in some form
 - Therefore, we should do this, too.

WHAT IS Strategic Planning?

- “Involves setting up a strategy that your business is going to follow over a defined time period” ⁽¹⁾
- “A disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future” ⁽²⁾
- “Future” = short term (over the next year) AND long term (next 3-5 years)



Strategic Planning 101

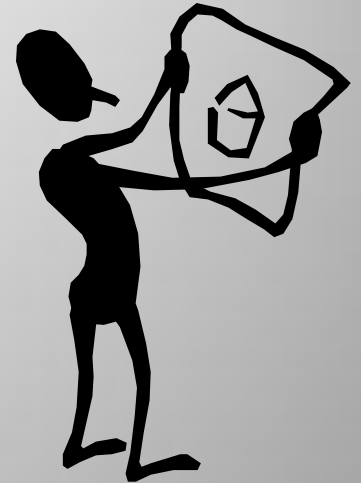
- Components

- Vision

- Analysis

- Goal Setting

- Goal Implementation & Monitoring



Companies whose employees understand the mission and goals enjoy a 29% greater return than other firms (Watson Wyatt Work Study).

Vision

- Gives shape and direction to the organization's future ⁽⁶⁾
- Ties in to State/National PBL, but unique & specific to each local chapter
 - Local culture
 - Local activities
 - Local chapter characteristics
- Keep it simple & easy to communicate
 - Example: Mother Teresa – “help the poor” ⁽³⁾
- Should reflect core values ⁽⁴⁾
- Why does our organization exist at our school? ⁽⁵⁾
- Work with your leadership team and chapter to develop & communicate your vision.





Vision

- A good vision:
 - Attracts commitment
 - Energizes people
 - Creates meaning in organization members' lives
 - Establishes a standard of excellence
 - Bridges the present and the future
- Examples:
 - “In two decades our services will never be needed” (Illiteracy program)
 - “No child in our city will go to bed hungry” (soup kitchen)

Analysis

- SWOT

- Strengths

- Corporate partnerships
- Large freshman class
- Staff/Faculty Support



- Weaknesses

- Lack of organizational “culture”
- Separation between leadership team & membership



- Opportunities

- Work with school to organize career fair

- Threats

- Recruitment competition from other student organizations

- Situational Analysis
 - Where are we now?
 - What are we good at?/What do we do well?
 - What needs improvement?
 - Where are we going/Where do we want to be?
 - In the next year?
 - In the next 3 years?
 - In the next 5 years?
 - How are we going to get there?
 - Goal setting ...

Goal Setting

- Use the analysis to set goals for the future
- SMART Goals
 - Specific
 - As detailed as possible
 - Measurable
 - Use numerical indicators of success
 - Attainable
 - Achievable given the current state of the organization
 - Realistic
 - Given available resources
 - Timely
 - Deadlines
 - Should be separate short term and long term goals





Implementation & Monitoring

- Establish objectives
 - How specifically are we going to accomplish these goals?
 - Example:
 - Goal: Increase membership by 10 members by April 2009
 - Objectives: Speak in freshmen business classes, request that an email be sent to students, speak with student advisors and ask them to promote PBL, etc.
- Assign individuals to organize efforts in meeting the goals
- Establish meeting dates with the sole purpose of monitoring goal progress



Strategic Planning Tips

- This will (and should) take a significant amount of time
 - Probably will require several meetings to do well
 - Analysis should be detailed and comprehensive
- **STAY FOCUSED**
 - Keep a “big picture” focus
 - Try not to get distracted by minor details
 - Designate one person to keep the team on track



Strategic Planning Tips

- Be as honest with yourselves as possible
 - There is ALWAYS room for improvement, no matter how good the organization is
 - Be proud of the organization's strengths, but be able to admit the weaknesses and develop a plan to improve them

Strategic Planning Tips

- Communication is key
 - With leadership team
 - With advisors & administrators
 - With members
 - With State Officers
 - If we know your goals, we will be better able to provide you with what you need to achieve them
- Different perspectives are important in analyzing the current strength of the organization



QUESTIONS?



Summary

- We want to make sure that the hard work we're doing this year will pay off in the future.
- A formalized strategic planning program is a good first step in ensuring this.
- Solid, inspiring vision
- SWOT analysis
 - Be honest
 - Serious time and effort
 - Stay focused

Summary

- Goal Setting
 - SMART Goals
 - Communication is key
 - Follow up!
- Strategic Planning mini-exercise!!!!

Sources

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