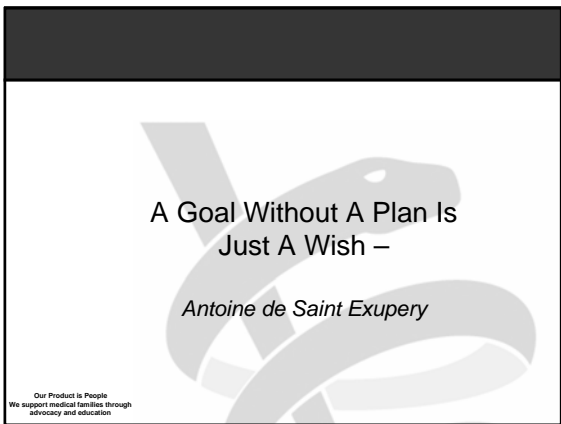


Strategic Planning for Alliances

How to Go from the Ordinary to the Extraordinary

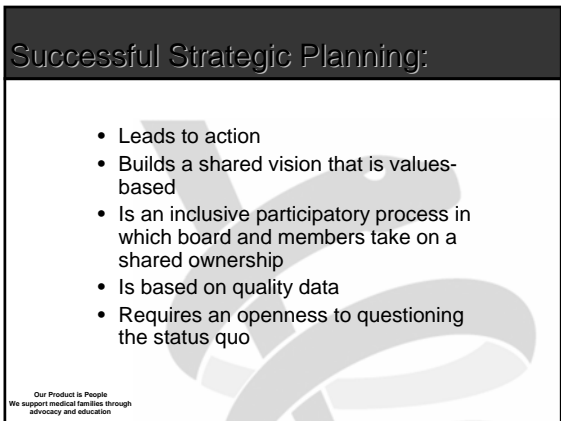
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A Goal Without A Plan Is Just A Wish –

Antoine de Saint Exupery

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Successful Strategic Planning:

- Leads to action
- Builds a shared vision that is values-based
- Is an inclusive participatory process in which board and members take on a shared ownership
- Is based on quality data
- Requires an openness to questioning the status quo

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What Is A Long-Term Strategic Plan?

- Simply put, it is deciding in advance what is to be done, how it is to be done, who is to do it, and what is expected as a result.

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What Strategic Planning Is Not

- It does not attempt to make future decisions
- It does not typically flow smoothly from one step to the next.
- It is not a substitute for the exercise of judgment by leadership.

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Organize Your Strategic Planning Session

- Establish a decision making protocol.
 - Establish beforehand rules or guidelines to clarify how you plan to go about making decisions.
 - Rules should center around encouraging creative input, while moving the group along to produce results at the end of the day.

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Guidelines to Consider

- Creative input is desirable
- Conformity of opinion is not desirable
- Full participation of all members is essential
- Overbearing egos are not essential
- Results are important

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Avoid Group Think

- Utilize “Nominal Group Technique”
 - All group members are physically present, but work independently.
 - Members write ideas down and present them individually.
 - Ideas are added to a master list by scribe.
 - Members silently and independently rank-orders the list.
 - Final decision determined idea with highest rank.

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Running Your Long-Term Strategic Planning Session

- **Assess Your Current Situation**
 - Identify Strengths and Weaknesses
 - How does your Alliance operate
 - Examine your Alliance’s finances
 - Look at your membership demographics

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Running Your Long-Term Strategic Planning Session

- **Identify Opportunities and Problems**
 - Look at needs of members and the community. Ask the hard questions:
 - Why are we losing members to other organizations?
 - Why are we still doing projects that are being done by others in the community?
 - What can we do better than any other organization?

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Running Your Long-Term Strategic Planning Session

- Examine local, state and national trends and how they impact your Alliance
- Examine emerging needs and trends

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Running Your Long-Term Strategic Planning Session

- **Redefine Your Mission Statement**
 - Do you need to realign your mission statement based on the new vision you have for your Alliance's future?
 - Identify your Alliance's values and beliefs, along with the key ideas brought out during the assessment of your current situation.

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Running Your Long-Term Strategic Planning Session

- **Redefine Your Long-Term Goals**
 - Select and then prioritize new long-term goals in which your Alliance must achieve results to reflect growth and success.
 - Make goals realistic, challenging and attainable in 3 to 5 years.

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Running Your Long-Term Strategic Planning Session

- **Sample Long-term Goals:**
 - Have leadership training that inspires members to leadership roles.
 - Enhance member services.
 - Realign Alliance organization to function more efficiently.
 - Improve public relations.
 - Improve partnership with medical society.

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Running Your Long-Term Strategic Planning Session

- **Prioritize Your Long-Term Goals**
 - Once goals are quantified, ask committee members to independently prioritize goals.
 - Re-evaluate any goal that is consistently ranked last on everyone's list

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Running Your Long-Term Strategic Planning Session

- **Quantify Your Long-term Goals**
 - Take overly general and vague goals and make them meaningful from a practical point of view.
 - Give goals a results oriented description.

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Running Your Long-Term Strategic Planning Session

- **Establish Your Tactical Objectives**
 - These objectives support your goals.
 - Usually of a short-term nature that specify how, when and what you need to do to achieve these goals.
 - Make them realistic, specific, measurable, consistent and time limited.

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Running Your Long-Term Strategic Planning Session

- **Delegating Responsibilities**
 - Prioritize tactical objectives
 - Assign responsibility
 - Establish target dates

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Running Your Long-Term Strategic Planning Session

- **Keep in mind when delegating responsibilities:**
 - How objectives will impact your finances. Will your dues support these objectives?
 - How long delegated member feels it will take to complete the objective. Remember members are volunteers. Unrealistic time frames will make plan seem impossible and will relegate plan to uselessness.

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Running Your Long-Term Strategic Planning Session

- **Monitoring Progress**
 - Implement system to keep track of the progress of tactical objectives and overall effect of your Strategic Plan
 - This is the final phase of your session

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Monitoring Progress

- Discuss written format for plan
- Appoint someone to write the plan
- Set a date of completion
- Who will monitor the plan
- Do you need additional checks to make sure the most critical objectives are carried out?

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Communicate Your Plan

- How will you communicate the results of this session to your general membership?

Remember:

“Management by objectives works if you know the objective. Ninety percent of the time you don’t.”

Peter F. Drucker

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Communicate Your Plan

- Have a separate handout for communicating your strategy
- Document should be short and to-the-point
- Use a few defined categories
- Create a balance between the dream and reality
- Keep language, concepts and format simple

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Communicate Your Plan

- Limit yourself to communicating no more than 10 (or fewer) objectives
- Make your objectives concrete and measurable to your members

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Share the Vision

If we want our members to help move our Alliance forward, we must communicate our vision and strategy with them!

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Alliance Vision

***To be the volunteer voice
for healthy families***

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Alliance Mission

***We support medical
families through
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