

# Strategic Planning

Executive Directors of parent centers have very challenging careers. For example, they need to ensure that high quality services are developed and provided; funds are raised; bills are paid on time; staff are hired, trained and supported; boards are recruited and effective; community awareness is high; and reports are accurate and submitted on time. Often it seems like there just aren't enough hours in the day. Sometimes, directors move from one potential crisis to another. Consequently, when someone (board member, staff, consultant) suggests that it is time to develop or revise a strategic plan, the first reaction often is: Who has the time?

Parent center directors who have led their organizations through a strategic planning process often acknowledge that the process can be time consuming but usually believe that the benefits of strategic planning outweigh the time invested in developing a plan. Before starting a process, however, some experts recommend that you determine whether the costs in time outweigh the benefits. For example, if an organization is experiencing a crisis or emergency, it may be more important to address this issue first rather than start a strategic planning process.

## Why Develop a Strategic Plan?

There are major changes occurring in the world in which we live and work. For example, most states are experiencing budget problems which may impact state education agencies, local school districts and families who have children with disabilities. Emphasis at the Federal level on the No Child Left Behind law may potentially have a dramatic impact on some states and how education services are delivered to children with disabilities.

Many businesses and private foundations have not fully recovered from the recent recession and consequently are providing less financial support to community organizations. Reauthorization of IDEA is likely to result in a law and rules that are significantly different than the 1997 law. All of these issues and many more, may impact parent centers directly or indirectly.

In times such as these, unless proactive planning occurs, parent centers may be placed in a position of constantly reacting to outside forces. By engaging in strategic planning, the parent center can deal with issues such as these in a planned approach. Examining and anticipating the changes around us can prepare parent centers for different scenarios in the future.

According to Bryan Barry, author of Strategic Planning Workbook for Nonprofit Organizations, studies show that organizations with strategic plans outperform those who don't have formal plans. This applies whether the organizations being compared are large or small.

## What is a Strategic Plan?

In its most simple form, a strategic plan is the result of a process used for setting a vision for the future. It can involve developing a mission statement or revising one, conducting an environmental scan, identifying potential customers and their needs, and analyzing your organization's strengths and weaknesses. This process usually results in a multi-year document that includes goals and contains benchmarks to measure progress along the way.

## Who Should be Involved?

Generally you want people who have an in-depth knowledge of your organization and services. This should include your board members and senior management staff. It can include others such as program staff and key volunteers. In assembling the group, you want it large enough to include diverse backgrounds or opinions, while small enough to enable it to work together efficiently.

Many Executive Directors engage the services of a consultant or facilitator to manage the process. This allows them to participate as active members of the strategic planning team without having to be concerned about the actual task of facilitation. When considering the use of an outside consultant, spend some time learning about their experience in this area, their costs, and whether they have any biases or potential conflicts of interest that might impact the planning process.



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## What are Key Elements of A Strategic Plan?

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There are different models of strategic planning. Organizations who wish to embark on a process would be well served to do some basic research about the potential models and methods available. Parent Centers may want to use the Individual Program Enhancement Plan (IPEP) as a planning tool. The IPEP can help to identify various areas to include in a strategic plan such as organizational structure, policies and procedures, financial and operational management, and more. They might also want to determine the amount of time needed to go through a strategic planning process and the cost of doing so.

Typically, models include doing an environmental scan- a process of reviewing key pieces of information to determine what kinds of changes are occurring that could impact your organization. An assessment of the organization's strengths, weaknesses, opportunities and threats is usually a component of strategic planning.

Identification of competitors and potential allies is often very helpful. A review of your services or products and their impact usually occurs. A discussion of the target population for your services, along with their needs helps focus the plan. Finally, goals are developed in key areas, based upon the information learned and the assumptions you develop. Many plans also include some information on resources needed and an assignment of responsibilities.

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## What Happens After the Plan is Developed?

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First, it is recommended that it be approved by your Board of Directors. Ensuring that the Board has a formal voice in the process will help create ownership of the planning committee's vision for the organization. It will also help them understand key issues, challenges and strategies facing the organization. This will enable them to perform their legal duties of providing oversight to the organization.

A mistake that some organizations make is to view the development of the plan as the final outcome. It is not uncommon for organizations to go through an extensive strategic planning process and then place the plan on a shelf, never to be seen again, or just referred to periodically. It is recommended that the plan be integrated into the organization's activities. Many organizations use the plan when creating new projects, setting annual goals or work plans, making decisions on how to use scarce resources, and developing budgets.

For the plan to work, there must be regular monitoring to determine progress being made in the identified key areas. If progress is not being made, it might be helpful to discuss whether the goal was appropriate, whether sufficient resources were assigned to meeting it or whether the goal needs to be revised. Using the strategic plan in this fashion enables it to become a living document to support the long-term vision and mission for your organization.

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## Conclusion

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Strategic planning does not need to be a mysterious process. It can be an effective way for parent centers to analyze where they've been, where they are going and how they will get there. Spending time on developing a plan and then ensuring that it becomes embedded into your organization, should help your organization achieve its goals.

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## Bibliography

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