



United Way Strategic Planning Process

Overview

Strategic planning is instrumental to the long-term success of a United Way. Many United Ways are wrapped up in the day-to-day concerns of providing products or services and do not take the time to adequately plan for the future. Facilitated strategic planning can bring together stakeholders from all areas of the company such as staff, board members, management, and member agencies to plan for the future in a productive way.

Perspectives Consulting Group, Inc. tailors strategic planning to fit the current situation and needs of the individual United Way. Organizations that have participated in a strategic planning process previously are encouraged to enhance and develop their current strategic plan, while organizations new to the strategic planning process will start with simple steps to reap the benefits of strategic planning.

Strategic planning has been used by United Ways to:

- Establish a common vision and focus for the organization
- Prioritize areas of concern for the organization to allocate resources effectively
- Set benchmarks for measuring outcomes and the performance of the organization
- Develop plans and goals for the organization in areas like marketing and fundraising
- Understand and prioritize the benefits of the organization to the community
- Develop goals and objectives for an awareness campaign
- Determine an appropriate message or messages for the organization

Strategic planning includes the review and analysis of the current situation, evaluating potential opportunities, and understanding the environment including: services, member agencies, fundraising, and promotional efforts. Since every United Way is different, Perspectives Consulting Group, Inc. customizes the strategic planning process to meet each organization's unique needs. Once basic information is collected, Perspectives Consulting Group, Inc. works with the organization to facilitate a direction for the future. One or more facilitated sessions are held with management, staff, board members, volunteers and stakeholders to reach understanding and consensus for the direction of the organization. The strategic plan is then formulated to reflect the goals of the organization, while outlining the actions necessary to achieve those goals.



Strategic Planning Process

Every strategic planning process is unique, but generally all strategic planning consists of two phases; exploring possibilities and opportunities, and prioritizing, goals and measures.

Exploring Possibilities and Opportunities.

This phase starts with a review of our strategic planning objectives – what do we want to accomplish through the strategic planning process. Normally these objectives are determined in discussion with the organization before the strategic planning session, and at the session they reviewed and used to focus our efforts.

For participants who have not participated in a strategic planning process before, a brief discussion and review of strategic planning – what it is and isn't, is helpful.

The strategic plan starts with the mission of the organization. Since most organizations have a mission, a review of the mission and validation of the mission is a quickly accomplished in a group discussion. The topic of vision is introduced and participants are asked to begin the process of examining the question "How will the world be different as a result of our organization?"

Determining who we serve as an organization is the next step and using group consensus, the key constituencies or stakeholders that our organization benefits are identified.

How could our organization benefit these people? In small group discussion identify how our organization could benefit each of the key constituency groups. These benefits will include current benefits as well as new benefits. Using the research results from our surveys and other research, it will be important to explore all of the benefits, especially those that are not currently offered by the organization.

How could we deliver these benefits? In small group discussion identify how our organization could deliver these benefits. These delivery methods will include current methods as well as new methods. Again, the research results from surveys and other research are integral to our understanding of the benefits desired by the constituencies and stakeholders we serve.

Mission:

What is the mission or purpose of the organization?

Vision:

What is the vision of the organization in the next 3-5 years?
How will the world be different as a result of our organization?

Benefits/Delivery:

How could the organization benefit our clients, community, donors, nonprofit organizations, etc.?

How could the organization deliver these benefits?

Organization Priorities:

What benefits must the organization deliver to our clients, community, donors, nonprofit organizations, etc.?

How will the organization deliver these benefits?

Measures:

How will the organization measure these benefits and their delivery?

Goals & Objectives:

What goals and objectives does the organization want to measure and achieve in the next 3-5 years?



Prioritizing, Goals, and Measures.

Prioritizing begins with establishing those core benefits that are essential to key constituencies and stakeholders. Using an interactive voting method, strategic planning participants will evaluate and prioritize the appropriate core benefits and delivery methods for the organization. This prioritization is normally done by constituency/stakeholder group.

Once the benefits are established, the methods of delivery are prioritized as well. The result of prioritizing the benefits and methods of delivery is a set of "organization priorities" which are used to focus the strategic planning.

The organization priorities are then examined individually to determine how the organization measures success for each priority. Using small groups, sets of measures are proposed for each organizational priority. These may be things that the organization is currently measuring, or they may require entirely new measures to evaluate.

Finally, as a whole, the strategic planning participants will establish goals and objectives for each organizational priority, using the identified measures. These goals and priorities will include the desired outcome, how it is measured, when it is measured, and who bears responsibility and accountability for the measure.

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Benefits/Delivery:

How could the organization benefit our clients, community, donors, nonprofit organizations, etc.?

How could the organization deliver these benefits?

Organization Priorities:

What benefits must the organization deliver to our clients, community, donors, nonprofit organizations, etc.?

How will the organization deliver these benefits?

Measures:

How will the organization measure these benefits and their delivery?

Goals & Objectives:

What goals and objectives does the organization want to measure and achieve in the next 3-5 years?

