

Strategic Planning and Management

Properly set up and used, strategic planning can be a powerful tool in helping an organization to reinvent itself to better meet today's and tomorrow's needs. While an association cannot be all things to all people, it must be responsive to a fast-changing environment. The strategic planning process involves the asking of many basic questions.

Following are some questions that the association can probably answer by the end of the strategic planning and management process.¹

- ◆ What is the purpose of mission of this organization? Why does it exist?
- ◆ What vision does the organization have about what it might become in the future?
- ◆ What services does this organization provide? What services should it provide in the future?
- ◆ Who benefits from these services? How might this clientele change in the future? How might the organization respond to these changes?
- ◆ Given the surrounding environmental conditions and the current capability of the organization, where should it concentrate efforts and resources to carry out its vision of the future?
- ◆ What performance measures will be used to track implementation of these priorities?
- ◆ What efforts will be made to revise the organization's priorities as conditions change?

Fundamental Questions to the Strategic Planning Process²

In its simplest terms, strategic planning attempts to answer four questions:

1. *Who are we?* The first step is to define or refine the association's mission statement. One way is to take the existing mission statement and revise it for changes. Another strategy is to use the blank-page approach. This method presents open-ended questions for response: "In the year 2020, our association will be known as. . . ;" "Premier provider of. . . ;" "Effective voice of. . . ;" "Leader in . . . ;" "Top training and professional development resource for . . . ;" "A first-quality organization dedicated to . . . ;" and "The standard-setting authority on"

¹Park, D.G. (1990). Strategic planning and the nonprofit board. Retrieved from National Center for Nonprofit Boards, Suite 510, 2000 L. Street, NW, Washington, DC 20036, p. 3.

²Murphy, J.M. (1995, Nov/Dec). "A four-question model for planning success," Chapter Relations Newsletter, Retrieved from American Society of Association Executives, 1575 I St., N.W., Washington, DC 20005-1168, pp. 1, 4, 6.

2. *Where are we now?* The association and its chapters must take inventory and analyze both external and internal forces affecting the organization. What are the megatrends influencing the area? Both customers and the wider circle of stakeholders should be reviewed and involved in the process.
3. *Where or what do we want to be in the future?* Using the data obtained from all sources, the group can begin creating a vision for the association and its chapters. Using a three- to five-year period, the association's functions can be assessed and revised.
4. *How do we get there?* A strategic plan is useless unless action steps with deadlines are established. Future success depends on detailed implementation of action plans. A regular monitoring or reporting mechanism will keep each action plan and its major objective on track. The basic ingredients for carrying out a plan include: time, money, personnel, training, authority, and resources. An action plan needs to take into account each of these ingredients to increase the likelihood of success.

Stakeholder Review

The professional literature has begun to focus on the needs of stakeholders. Much attention has been spent on "customer service." While the results of the attention may be questioned, a great deal of emphasis was placed on satisfying the needs of "customers." The customers for most educational associations are commonly viewed as the professionals in the specific discipline area. However, progressive management practice suggests that associations should think beyond its previous definition of the customer.

A common definition for stakeholder is someone who has a "stake" or interest in the organization. Besides learning assistance and developmental education professionals, others may be interested in the activities and services of NADE. These groups might include: students, parents, spouses, institutional upper-level management, local institutional board members, state coordinating boards of education, state and national departments of education, state and national elected politicians, and other possible groups.

Dr. Steven Covey, author of *Seven Habits of Highly Effective People*, talks about the need of businesses to conduct a 360-degree review. In addition to being concerned about the perceptions of the customers, he also suggests a review of the employees, suppliers and any other group that the business has a relationship.

Stakeholder Strategic Review Matrix³

The Stakeholder Strategic Review Matrix allows a way to think about the present and new products/services for both existing and new stakeholders. Many associations spend nearly 80 percent of their time and energy on delivering existing products and services to its existing customers and stakeholders. Progressive organizations need to balance time between maintaining such services while seeking out new customers and services. The roll-out of new services may take three to five years.

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The following matrix worksheet is divided into four sections:

- ◆ **Quadrant I** represents existing products and services marketed to members. This could encompass as much as 80 percent of an organization’s resources and energies. Primary member benefits and membership retention programs primarily reside in this quadrant.
- ◆ **Quadrants II and III** represent new initiatives. **Quadrant II** includes new product offerings to existing members (e.g., enhanced job placement service, training workshops for program evaluation, new publications and videotapes).
- ◆ **Quadrant III** represents the marketing of existing, established products to nonmembers (e.g., membership recruitment). To what extent are existing NADE activities and services of benefit to high school teachers and parents?
- ◆ **Quadrant IV**, an attractive arena for strategic planning teams, is a potential minefield, since it represents marketing new products and services to nonmembers. The goals that fit into **Quadrant IV** require the organization to sell something with which it has almost no familiarity to customers that may have previously rejected membership. While the largest portion of time by the organization is spent serving its primary members (**Quadrant I**), a smaller percent of time should be spent in **Quadrant IV**. As organizations undergo the need to reinvent themselves, this is a prime area for attention.

³Polaniecki, R. (1995, Nov/Dec). “How to profit from a strategic planning session,” Chapter Relations Newsletter, Retrieved from American Society of Association Executives, 1575 I St., N.W., Washington, DC 20005-1168, pp. 5-6, 8.

Stakeholder Strategic Review Matrix

Stakeholders	Products and Services	
	Existing	New
Existing 1. 2. 3. 4. 5. 6.	<i>Quadrant I</i>	<i>Quadrant II</i>
New 1. 2. 3. 4. 5. 6.	<i>Quadrant III</i>	<i>Quadrant IV</i>

Based on materials developed by the American Dental Association, Chicago, IL