



**The How & Why of Strategic Planning**

Presented by




**Ruth Stone of**  
CDO CONSULTING GROUP

Wednesday, November 2, 2022  
11:30am-1:00pm



**Steuben County Community Foundation**  
*Where Giving Has Impact*

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**Dream Big** \_\_\_\_\_

\_\_\_\_\_ **Plan Effectively** \_\_\_\_\_

\_\_\_\_\_ **Get it Done**

*Strategic Thinking for Future Success*

Ruth Stone, President



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**Agenda**

1. Introductions
2. What is a strategic plan?
3. Why are they needed?
4. When are they needed?
5. Steps to create a plan
  - Dream Big
  - Plan Effectively
  - Get it Done
6. Summary
7. Q & A
8. Next Steps

I gave you life.  
You give me your Reese's.  
That's the deal.  
*- Every parent on Halloween*

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### Attendee Q & A prior to session

1. What is the most important information to include in the strategic plan?
2. How do you get your board to start thinking strategically?
3. When you have some board members who are resistant to change-how do you get them to buy into the vision of strategic thinking?
4. What is the most common mistake made when it comes to strategic planning?
5. We struggle with setting the goal timeframes and a usable template to ensure we are working toward our goals.
6. Are there templates available for walking the board through the process of strategic conversations and mind set?
7. How micro businesses located in downtown can help with Strategic Planning ?
8. Who sets policies?

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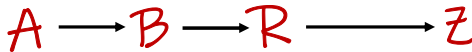
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### Introductions

1. Knowledge in the room
  - 44 people – staff, board members, volunteers, and consultants
  - 32 different organizations represented
  - 4 counties served – Steuben, Noble, Dekalb, and Allen
  - Causes include conservation, women and children, education, healthcare, animals, advocacy, lake life, city development, food service, housing, railroads, youth, and mental health
2. What brings us together?



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## What is strategic planning?

*"Strategy is the means by which organizations achieve their objectives"*

- Contemporary Strategy Analysis by Robert M. Grant

Strategic planning is the process by which an organization formalizes their dream for the future, creates goals and a plan to effectively move toward it, and measures success.

**Dream Big – Plan Effectively – Get it Done**

- Ruth L. Stone, CDO Consulting Group

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SO WHAT?



WHO CARES?

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## Why are strategic plans needed?

*"Start With the Customer and Work Backward."*

**— Jeff Bezos**

Founder and former CEO of Amazon

*"Work smart. Get things done."*

**— Susan Wojcicki**

CEO of YouTube since February 2014

*"By failing to prepare, you are preparing to fail."*

**— Benjamin Franklin**

Inventor and contributor to the Declaration of Independence

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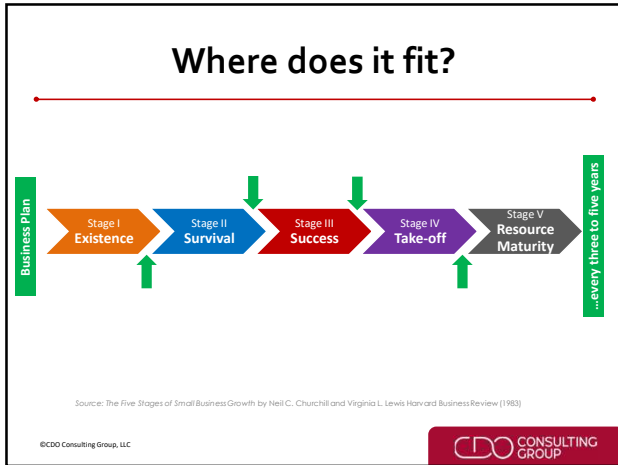
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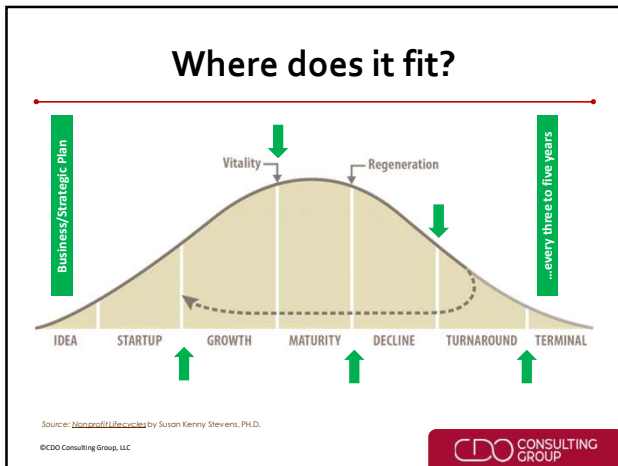
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### Step 1 – Dream Big

- Prepare to dream
  - Build your planning team and assign roles
  - Consider hiring a consultant
  - Define the approval process
- Dream - Create or validate vision and mission
  - What's your vision for the future?
  - What problem do you want to solve?
  - Why do you want to solve it?
  - Who will you serve or who is your customer?

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What's your  
**BHAG?**

Big. Hairy. Audacious. Goal.

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**Mission:** Connecting people who care with needs that matter to our community

**Vision:** Serving as a community leader and improving the quality of life by assessing, supporting, and coordinating philanthropic giving and endowment building

**Mission:**  
To aid and promote the enhancement and preservation of lake resources, land use, and recreational opportunities of Lake James, Steuben county, Indiana.

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**Vision:** To build a vibrant community through connections.

**Mission:** To collaborate with our community to promote, advance, and preserve a vibrant historic downtown-rich in Art and Culture and inviting for all.

**Mission:**  
Boomerang Backpacks feeds hungry youth while educating high school students and encouraging community involvement.

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**The Nature Conservancy** 

**Vision:** To leave a sustainable world for future generations.  
**Mission:** Conserving the lands and water on which all life depends.

  
**UBER**

**Mission:** Transportation as reliable as running water, everywhere for everyone.

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## Step 2 – Plan Effectively

- Analyze where you are today

Strengths	Weaknesses
Opportunities	Threats
<b>SWOT</b>	



- Engage stakeholders
  - Board, staff, funders, clients, partners, community, etc. These are the people who are vested in your success.

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## Step 2 – Plan Effectively (cont'd)

- Formalize strategic goals

*Strategic Plan for a Disgruntled Teenager*

<b>Vision:</b>	Never have to live with my parents again			
<b>Mission:</b>	Become financially self-sufficient from age 22 through the rest of my life			
<b>Strategic Goals:</b>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; border-right: 1px solid black; padding: 2px 5px;">1. Develop skills to obtain a job that will support me</td> <td style="width: 33%; border-right: 1px solid black; padding: 2px 5px;">2. Avoid debt</td> <td style="padding: 2px 5px;">3. Stay healthy</td> </tr> </table>	1. Develop skills to obtain a job that will support me	2. Avoid debt	3. Stay healthy
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## Step 2 – Plan Effectively (cont'd)

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- Formalize strategic goals

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## Step 2 – Plan Effectively (cont'd)

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- Develop objectives to reach your goals
  - SMART Goals with key performance indicators (KPI's)/ metrics
  - Define starting point and end goal
  - Name responsible person
  - Due dates
- Develop tactics for goals



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Step 2 – Plan Effectively (cont'd)						
• Develop objectives to reach your goals						
<i>Strategic Plan for a Disgruntled Teenager</i>						
Vision:	Never have to live with my parents again					
Mission:	Become financially self-sufficient from age 22 through the rest of my life					
Strategic Goals:	1. Develop skills to obtain a job that will support me		2. Avoid debt		3. Stay healthy	
Objectives:	a. Continue education after high school	b. Obtain internships	a. Save 10% of every paycheck	b. Pay off credit cards monthly	a. Exercise regularly	b. Eat vegetables
Current state:	Still in high school	Working at McDonalds	Zero savings	One credit card with \$20 balance	Sitting on the couch	Eating a pizza
Goal state (may progress across multiple years):	Start college or trade school	Secure internship to gain hands on experience	Save \$5 each week	Pay off balance on-time every month	Walk 10k steps/day on average	Eat vegetables three times per week
Group(s) involved:	High school guidance office	College or trade school placement office	Credit union or bank	Credit union or bank	n/a	n/a
Person responsible:	Me	Me	Me	Me	Me	Me
By when:	Fall following high school graduation	March following high school graduation	Every paycheck	Every month	One week from today	One month from today

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Step 2 – Plan Effectively (cont'd)						
• Develop tactics for goals						
<i>Strategic Plan for a Disgruntled Teenager</i>						
Objectives:	a. Continue education after high school	b. Obtain internships	a. Save 10% of every paycheck	b. Pay off credit cards monthly	a. Exercise regularly	b. Eat vegetables
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Person responsible:	Me	Me	Me	Me	Me	Me
By when:	Fall following high school graduation	March following high school graduation	Every paycheck	Every month	One week from today	One month from today
Tactics:	<ul style="list-style-type: none"> <li>- Research colleges and trade schools</li> <li>- Apply to trade schools or colleges</li> <li>- Apply for financial aid</li> <li>- Pick a major</li> <li>- Go to class</li> <li>- Get good grades</li> </ul>	<ul style="list-style-type: none"> <li>- Create a resume</li> <li>- Go to job fairs</li> <li>- Buy a suit</li> <li>- Get a haircut</li> <li>- Wear deodorant</li> <li>- Brush my teeth</li> </ul>	<ul style="list-style-type: none"> <li>- Use direct deposit</li> <li>- Set up an auto transfer to savings</li> <li>- Create a budget or spending plan</li> <li>- Build an emergency fund</li> </ul>	<ul style="list-style-type: none"> <li>- Don't spend more than I make</li> <li>- Set up auto pay for all bills</li> <li>- Stop online shopping and/or betting</li> <li>- Hang out with people with similar spending habits</li> </ul>	<ul style="list-style-type: none"> <li>- Join a health club</li> <li>- Find a workout buddy</li> <li>- Buy running shoes</li> <li>- Sign up for a fun run</li> </ul>	<ul style="list-style-type: none"> <li>- Buy vegetables</li> <li>- Learn to cook vegetables</li> <li>- Teach yourself to eat vegetables</li> <li>- Buy ketchup</li> </ul>

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Strategic Plan for a Disgruntled Teenager						
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## Step 3 – Get it Done

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- Decide on format to capture information
  - Use format that works with your organization
  - Report documenting time < 60 minutes per mo.



**2) Objective:** Prevent the long-term negative effects of untreated hearing impairment for vulnerable infants and children.

a) **Emphasize being a first step provider in marketing to youth serving groups.**


i) **Goal:** Increase patients visits in the Fort Wayne clinic by 20% to XX new youth patients

ii) **Have:** XX new first step patients in fiscal year 2017

iii) **Who:** Clinical staff with marketing support

iv) **Due:** 12/31/2018

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## Step 3 – Get it Done (cont'd)

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**Project Summary Task:** Special task identifying entire project

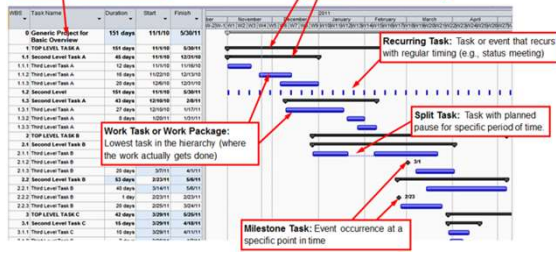
**Summary Task:** Any with lower-level subtasks

**Recurring Task:** Task or event that recurs with regular timing (e.g., status meeting)


**Split Task:** Task with planned pause for specific period of time

**Work Task or Work Package:** Lowest task in the hierarchy (where the work actually gets done)

**Milestone Task:** Event occurrence at a specific point in time



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## Step 3 – Get it Done (cont'd)

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- Commit to action
- Monitor progress
  - Who will champion accountability?
  - How and when will progress reports be made?
  - Hold people accountable



REVISE AS NECESSARY



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### Step 3 – Get it Done (cont'd)

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Celebrate successes along the way and share with stakeholders!

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### Strategic Planning Summary

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1. ✓ Dream Big 
2. ✓ Plan Effectively 
3. ✓ Get it Done 

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### Attendee Q & A prior to session

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1. What is the most important information to include in the strategic plan?
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### Next Steps

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Jenna Ott, Vice President of Programs  
jott@dekkofoundation.org



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### Q & A after session

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Ruth@CDOConsultingGroup.com

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