

Strategic Planning

WHAT IS STRATEGIC PLANNING?

Strategic Planning is a process in which an organization sets priorities, focuses energy and resources, and develops the goals of the organization. Strategic planning sets everyone in an organization moving in the same direction striving to achieve the Vision and Mission of the organization. Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful.

WHAT IS A STRATEGIC PLAN?

A Strategic Plan is a document used to communicate the Vision, Mission, Value and Goals that come from the planning process. The Plan is a guide to direct the actions of the organization. In any journey, a map is needed to tell you, not only where you are going, but when you have reached your destination.

Organizations with no strategic plan tend to only react to address immediate problems a kind of crisis management approach. A Strategic Plan will allow an organization to be proactive.

COMPONENTS OF A STRATEGIC PLAN

There are four basic components to a Strategic Plan: Vision, Mission, Values and Strategy.

Vision: The Vision of an organization communicates where the organization wants to be. It is what the 'world' will look like when the mission is achieved. The Vision is long term and future focused. As an example, the Vision of ACNM is "Advancing the health and well-being of women and newborns by setting the standard for midwifery excellence."

Mission: The Mission of an organization states why the organization exists. The Mission of ACNM is, "ACNM works to establish midwifery as the standard of care for women. We lead the profession through education, clinical practice, research, and advocacy."

Values: Values are the shared beliefs among the members of an organization. ACNM has nine values identified:
Excellence
Evidenced-Based Care
Formal Education



Inclusiveness
Women-Centered Care
Primary Care
Partnership
Advocacy
Global Outreach

These values help guide decisions made by ACNM and the direction it is moving. While this is just a list, each value is expounded upon on the ACNM website.

Strategy: The Strategy of the organization is the goals in place to achieve its mission and vision while holding true to its values. The Strategy also includes how the goals will be accomplished with detailed steps that will be carried out.

Most Affiliates have their Vision and Mission detailed in their bylaws. If not, the Affiliates have the option to adapt the ACNM Mission and Vision to their own affiliate. However, the strategy will be different for all Affiliates.

STRATEGY

Strategy. Strategic Objectives. Strategic Goals. Goals. Whatever word you decide to use, the meaning is still the same. Strategy is an important part of the plan; it is where the goals are set and the steps necessary to accomplish the goals are developed.

But what is a goal? What is a GOOD goal?

A goal, set as part of a Strategic Plan, should be a one-three year action statement. They should start with a verb to show movement: increase, decrease, improve. Goals set as part of strategy should be SMART.

S – Specific

What exactly are you trying to accomplish?

M – Measurable

How will you measure this? It is best to include quantifiable terms.

A – Achievable

Goals must provide a stretch that inspires people to aim higher, but they must be achievable. Goals should not set up an organization for failure.

R – Realistic.

Is the goal something you have the time, talent and passion to work towards?

Do you have control or influence over the goal?

T – Time Bound



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“By When” will the goal be complete? Give the goal an end point – six months; one year; three weeks.

Examples of SMART goals:

1.) Hold 2 affiliate meetings that offer CEUs in 2014.

Specific? Yes. An outside member knows exactly what the affiliate hopes to accomplish.

Measurable? – Yes. Two meetings.

Achievable? Yes. It may be a stretch, but the affiliate members are not being set up for failure.

Realistic? Yes. The affiliate has the time, talent and resources to put on meetings; they also have the support of the national office.

Time Bound? Yes, in the year 2014.

2.) Increase Affiliate involvement in Lobby Day by 10% a year, for three years.

Specific? Yes. However, this goal could use a definition of “involvement”.

Attend? Make calls? Help develop talking points?

Measurable? Yes. 10% a year for three years

Achievable? Yes. It is a stretch/increase and will require the affiliate to determine current level of involvement to know what a 10% increase is, but is doable.

Realistic? Yes. The Affiliate has the time, talent and resources to carry this out if they have the commitment.

Time Bound? Yes. Increase of 10% a year, for three years.

Each of these examples should be broken down into more detail when flushing out the goal. In Example 1, the Board may decide to create a committee that would be charged with setting up the meeting; the Committee may break down who will find the location; who will set the program. The Board may then request quarterly updates to make sure the planning is on track and the meeting is set to occur as planned.

In Example 2, the Board may ask the Affiliate Legislative Chair for input on how to best proceed. The Chair may create a committee to help recruit members to participate. The Board may ask the Affiliate Chair to define “involved”.

Both of these examples show that even though the goals are “SMART”, there is still a lot of work that needs to be done!



HOW TO AVOID A PLAN FROM “HITTING THE SHELF”

Too often, strategic plans are developed, everyone is energized and then the plan is put on shelf, never to be seen again! With so much time and effort devoted to the process and the plan, you don't want this to happen.

The most important thing a Board can do is to **communicate** the plan to the entire membership. The membership needs to know the process and planning that went in to the Plan and the outcomes expected. This will help increase buy-in from the membership which, in turn, will increase accountability.

Reviewing the plan is an important part of plan implementation. The plan should be reviewed, at a minimum, annually. During the review process, the Board can also make changes to the plan. The environment surrounding organizations changes and the goals that were set may no longer be relevant or even possible. Reviewing the Plan keeps it in the forefront of the Board's activities, but also allows the Board to update it as needed.

The Plan needs to be structured in a way that it is clear who is **accountable** for each section or goal. The Board is accountable for the overall plan, but that does not mean they are responsible for implementing all parts of the plan. Specific committees or working groups that are responsible for carrying out goals need to be identified as part of the Plan.

In order for the Plan last through changing boards and leadership, it should be **short** and **focused**. If the goals and action statements not clear, the incoming leaders may not know what was the intended goal or outcome. Keeping the Plan in plain terms will help ensure its implementation over the course of time.

Finally, one of the biggest indicators of success is **commitment**. Commitment is needed from all levels to help ensure a successful implementation. Commitment is needed from the Board to ensure that decisions are made based on the Plan; commitment is needed from the Committees to implement the plan and work towards the goals; commitment is needed from the members to participate in the activities and engage with the Affiliate.

HELP!

Strategic Planning does not need to be difficult or scary! It is simply answering the questions:

- Where do you want to go?
- How are you going to get there?
- Who is going to do it?



- How will you know when you are there?

Many Affiliates are already doing this, but not in a formal way. If you would like additional information about strategic planning, My Strategic Plan (www.mystrategicplan.com) has a variety of resources to assist you in the different stages of planning; some are available for a cost, but there are also several free videos and white papers. The National Office is also available as a resource to help guide you through the planning process.

You, as leaders, are not alone as you set out on this journey!



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