

All About Strategic Planning

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What is Strategic Planning?

There are many definitions of strategic planning, each with its own subtle nuances. Consistencies in the definitions emphasize that strategic planning is an intentional thinking process done for the purpose of determining:

- what it is a group does;
- why the group does it; and
- for whom they do it.

Simply put, strategic planning determines where an organization is going over the next 3-5 years, how it's going to get there and how it will know if it got there or not¹.

The result of strategic planning is a roadmap to provide direction over a defined time frame (frequently between 3-5 years). The strategic plan identifies the mission, vision and guiding principles and strategies (sometimes called components). It is helpful to revisit the strategic plan at least once a year to make sure it is still an accurate reflection of what the coalition does. A full strategic planning process should be completed at least once every 3-5 years or sooner if the coalition is experiencing tremendous change.

Who should be involved in Strategic Planning?

It is important to involve as many members of your community partnership as possible in the strategic planning process. Aim to have representation from organizations who work within each of the key channels and topic areas the community partnership works in. Involvement in this process will increase partner buy-in and commitment to achieving the jointly created vision and mission. Broad partner representation will also be invaluable as you assess the environment in which you operate.

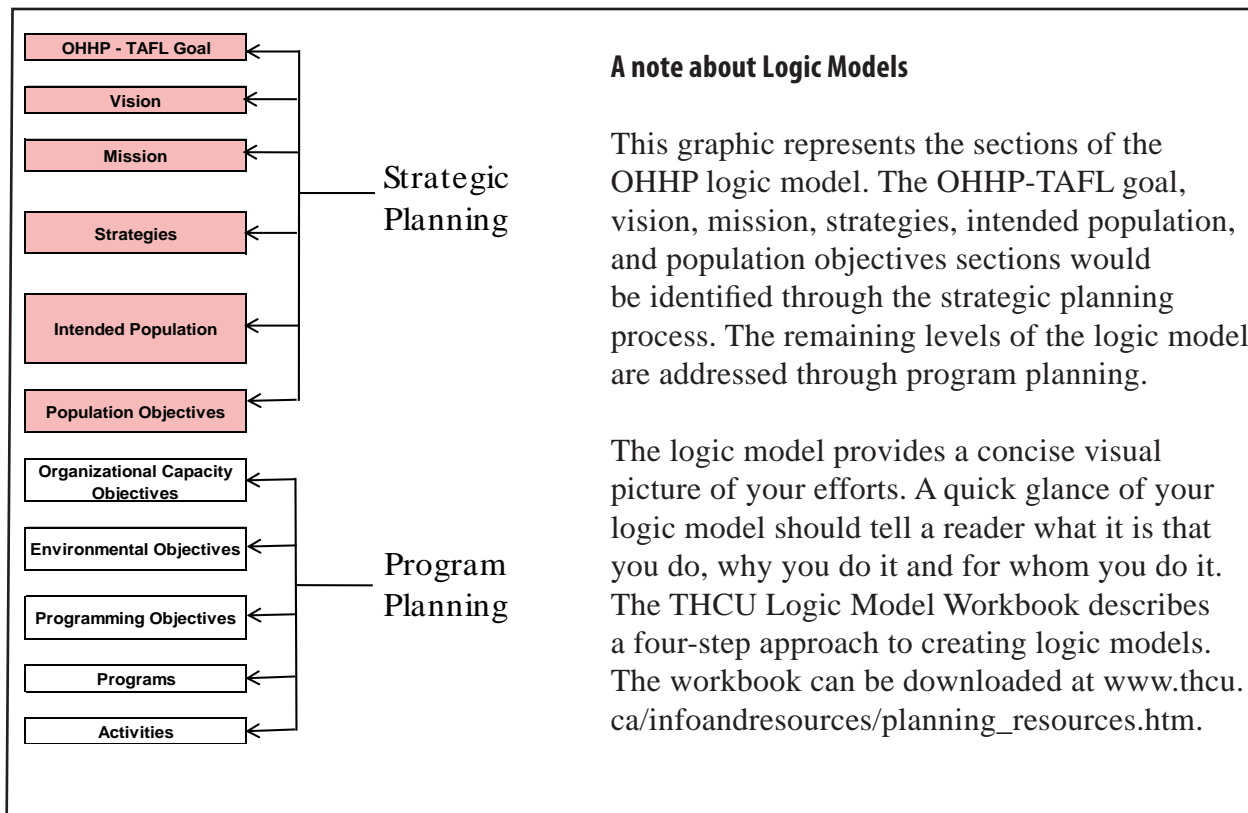
Strategic Planning vs Program Planning

Two key differences between strategic and program planning are the focus and the question that the planning is intended to answer. A strategic plan usually focuses on the entire organization, while a program plan focuses on a specific program or service. Strategic planning focuses on answering "what should we do?" Program planning focuses on answering "how will we do it?"

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@ a glance



Strategic Planning Lingo^{2,3,4,5}

Vision is the long-term purpose to which all goals, objectives and strategies contribute over time.

Mission statement is a precise agreed-upon statement of the reason an organization exists. It describes an organization's primary thrust or purpose.

Guiding principles are statements of values that guide planning and decision-making.

A **strategy** is a set of actions, which remain fairly constant over the life of the project. Strategies are often based on pressing issues or challenges affecting the achievement of the mission and vision, values and services. They describe a major area of responsibility over a 2-4 year period and usually require collaboration among stakeholders to ensure success, so therefore are usually tied to stakeholder needs and expectations in order to engage them. In the context of the OHHP, a CP might establish a Workplace strategy, a Youth Strategy or a Physical Activity strategy. Often the structure of work groups is based on these strategies.

Strategic goals identify a limited number of priorities where the organization will focus its energy during the period covered by the plan. Strategic goals describe the desired outcome of each of strategy.

A **situational assessment** examines the legal and political environment, stakeholders, the health needs of the population, the literature and previous evaluations, as well as the overall vision for the project. It encourages considering the strengths of and opportunities for individuals and communities. In a health promotion context, this also means looking at socio-environmental conditions and broader determinants of health.

Program or operational planning is usually done for a one-year period to identify specific programs and projects. The purpose is to organize the activities to ensure that the strategies will be achieved.

A **PEEST analysis** involves reviewing the political, economic, environmental, social and technological factors that could potentially affect your efforts.

Conducting a **SWOT analysis** involves discussing the strengths, weaknesses, opportunities and threats to your efforts. Consider factors internal to your coalition as well as external.

“Strategic thinking means asking, “Are we doing the right thing?” Perhaps, more precisely, it means making that assessment using three key requirements about strategic thinking:

- *a definite purpose be in mind;*
- *an understanding of the environment, particularly of the forces that affect or impede the fulfillment of that purpose; and*
- *creativity in developing effective responses to those forces.”*

(idealist.com, 1999)⁶

Strategic Planning Steps

There are a number of strategic planning models to choose from. It is important to find the one that fits best for your coalition. We have chosen to adapt the model created by the Wellesley Institute as an example of the basic steps involved in strategic planning. The model is adapted and used with permission of Wellesley Institute. Further copying of this information is prohibited.

1. Build your vision, mission and goals

A vision statement is built from the beliefs, values and principles your organizations holds and should describe the direction you intend to strive towards. The mission statement broadly describes the overall purpose and intent of your organization, the approach you will use, the functions you will carry out, and the programs you will offer. From the vision and mission come the goals you intend to achieve – the high-level, ultimate ends to which your efforts are directed. Typically, goals in a strategic plan relate to what must be accomplished to move the organization into the future outlined by the vision and mission.

2. Understand the population you intend to reach

In strategic planning, it's important to describe who the population you are intending to reach is, in order to understand how you can meet their needs. This may involve collecting demographic characteristics such as age, gender, ethnicity, education and income. Knowing where they live, work and go to school may be helpful. You should also identify the needs of your population. What are the issues that most affect their health? Rely on health data and research as much as possible. Resist the temptation to assume that you know what their needs are!

3. Scan your environment

Conducting an environmental scan or situational assessment will provide valuable information on the environment in which you are operating. Conducting SWOT and

PEEST analyses can be a part of this process. Scanning the external environment may involved looking at demographics, social indicators, agencies and programs in similar fields, assessing the political environment, and current research. Looking internally involves information about your programs, resources, staffing and structure.

4. Determine the key issues

Issues are the trends, events or developments that affect the organization and the population it serves, that may require some form of response, and over whose outcome the organization may expect to exert some influence. Being strategic means determining which issues are most critical among the many facing an organization and the population it serves. A strategic plan usually focuses on two, three or four key issues that will provide the framework for the strategic plan. Fewer is better!

5. Identify and select strategies

Strategic actions form the basis of the work to be done to address the key issues in your plan. They describe how the organization will proceed, and specify the activities you will use to move ahead.

You can identify possible actions through the usual brainstorming process, asking how this key issue can be addressed. Given the importance of selecting activities that are based in evidence, you may also want to investigate sources such as PHRED, the CDC's Community Guide, The Portal, and TEIP. See the resources section on page 4 for details.

6. Create your program plan

A program plan or action plan outlines the specific steps necessary to carry out the strategies you've identified. It is a clearly defined plan for achieving your goals, including roles, responsibilities, and time frames. The program planning process will be described in greater detail in the next issue of @ a glance.

Strategic Planning Tips

Contact the Heart Health Resource Centre for consultative help for your strategic planning session. An outside facilitator will guide the process so you can focus on contributing to the discussion. One-on-one coaching support is also available to coordinators. Our consultants can review your logic model and program plans with you. To find out more, or to request a service, visit www.hhrc.net.

Assign an existing group to take the leadership in coordinating the strategic planning process (e.g., steering committee, executive committee).

Set aside dedicated time for strategic planning. Ensure key partners are able to attend the strategic planning session.

Collect information from both internal and external stakeholders prior to the strategic planning session to inform the process.

As a part of the situational assessment step, check out the Effective Public Health Practices Project <http://old.hamilton.ca/phcs/ephpp/ReviewsPortal.asp> and the Community Guide www.thecommunityguide.org for systematic review evidence regarding chronic disease prevention. The Evidence Informed Practice Project (TEIP) Compendium <http://teip.hhrc.net/tools/eipc/index.cfm> and the Public Health Agency of Canada's Best Practices Portal <http://cbpp-pcpe.phac-aspc.gc.ca/> are also excellent resources.

Link the strategic planning with your program planning. HHRC's Program Planning @ a Glance is coming soon!

Keep your strategic plan alive. Consider structuring your meetings according to your coalition strategies.

Tips from HHRC's Consultants!

Tricia's Tip

Don't place the strategic plan elements on a shelf somewhere to periodically dust off. Keep your day to day efforts grounded in your vision and mission. Use your vision, mission and strategies as a filter to help decide whether or not to include potential opportunities in your plan.

Kim's Tip

Strategic planning is a process of engagement, capacity building and strengthening partnerships. It is not a one day process but the development of your community partnerships "guidebook" for working together to meet your collective vision. Once your partnership has developed their strategic plan, it is an excellent recruitment tool for inviting new community partners to the partnership and renewing the relationship of current partners.

Dianne's Tip

Avoid the temptation to begin your strategic planning process by reviewing and word-smithing your existing vision and mission statements. Instead focus on holding "big picture discussions" with your partners about what's been working and what hasn't been working, emerging opportunities and situational road bumps that need to be managed.

Pam's Tip

Although it is tempting to develop plans based on experience and "gut feelings", it is important to gather objective data to help you identify priorities. Look at trends and information from such sources as local epidemiological stats, economic development reports and environmental scans. Develop questionnaires or conduct focus groups if necessary. Compare the results with provincial data. What does this data tell you about the local needs: Where can we focus your efforts to have the most impact?

Andrea's Tip

Make strategic planning fun! Sprinkle active icebreakers throughout the day. Consider presenting some information or conducting an exercise in a game show format or other interactive way. Who in your community partnership has a particular talent or strength that could engage in the process? And finally - always serve excellent food to keep the creative juices flowing.

Helpful Resources

Tell us about your favourite planning resources! We'd like to include them on our website. Send your resources to heart@opha.on.ca.

THCU's Introduction to Health Promotion Planning Workbook available at www.thcu.ca/infoandresources/planning_resources.htm contains a detailed description of the steps to strategic and program planning. The THCU planning model will be highlighted in the HHRC's Program Planning @ a Glance. Additional THCU planning resources can be found at http://www.thcu.ca/infoandresources/planning_resources.htm

The Comprehensive Heart Health Planning Workbook was developed by the HHRC in 1998 to guide newly created OHHP groups. The workbook, facilitator's guide, and other helpful planning resources can be found on the HHRC's website at <http://www.hhrc.net/skills/planning.cfm>.

Charity Village has published a number of articles about strategic planning.

A list of them is found at www.charityvillage.com/cv/research/rstrat.html

The University of Kansas Community Toolbox <http://ctb.ku.edu> provides information and examples related to a number of community development components including strategic planning.

A number of tips and tools related to strategic planning provided by the Free Management Library www.managementhelp.org/plan_dec/str_plan/str_plan.htm#anchor4293716937.

Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders by Richard A. Mittenenthal provides helpful tips on strategic planning http://www.tccgrp.com/pdfs/per_brief_tenkeys.pdf

The Wellesley Institute website contains many helpful resources on Strategic Planning as well as other topics <http://www.wellesleyinstitute.com/capacity-building/resources>

Effective Public Health Practices Project <http://old.hamilton.ca/phcs/ephpp/ReviewsPortal.asp> and The Community Guide www.thecommunityguide.org are systematic reviews of evidence regarding chronic disease prevention. The Evidence Informed Practice Project (TEIP) Compendium <http://teip.hhrc.net/tools/eipc/index.cfm> and the Public Health Agency of Canada's Best Practices Portal <http://cbpp-pcpe.phac-aspc.gc.ca/> are also excellent resources.

Reference

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- ⁶Idealist.com (revised 1999). What is strategic planning?. Available from <http://www.idealist.org/npofaq/03/22.html>.

About the HHRC

The Heart Health Resource (HHRC) anticipates and meets the needs of public health agencies and their communities in chronic disease prevention.

The HHRC was established in 1993 to support five demonstration projects in Ontario. It currently works with 37 community partnerships of the OHHP-Taking Action for Healthy Living.

The HHRC is a project of the Ontario Public Health Association (OPHA) and is funded through the Ministry of health Promotion. It is a member of the Ontario Health Promotion Resource System (OHPRS).

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