
NOT STRATEGIC PLANNING AGAIN?

OHIO URBAN RESOURCES SYSTEM CONFERENCE

NOVEMBER 2, 2017



BOTTOM LINE
CONSULTING GROUP

GOALS FOR SESSION

- Why a planning strategy
- Benefits of having a living plan
- When to do a planning process
- Components of strategic planning best practices
- Pitfalls to avoid

WHY ORGANIZATIONS PLAN?

- A new organization may need to articulate and agree on purpose
- A mature organization might need to:
 - Find new challenges
 - Shake complacency
 - Invigorate stakeholders
 - Move to the next level
- A challenged organization might need to solve a problem of direction, consensus or funding



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WHY STRATEGY?

- To set direction and priorities
- To get everyone on the same page
- To simplify decision-making
- To drive alignment
- To communicate the message

WHY LAUNCH A STRATEGIC PLAN PROCESS?

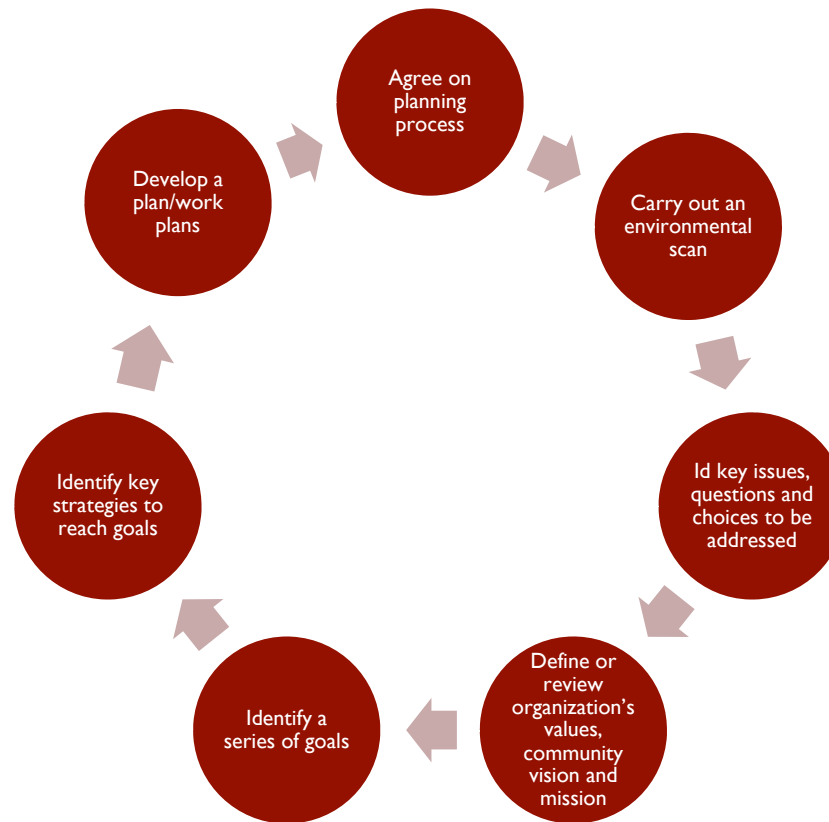
- Change happens
- Develop consensus around the mission
- Establishing metrics of performance
- Moves everyone out of their comfort zone, challenges assumptions and to find better strategies
- Use of combined perspectives and experience of many minds is likely to identify opportunities and suggest nuances
- Develops inclusion and communal purpose -- More informed, engaged and effective board and staff
- Fundraising--A newly refreshed strategy that maps out measureable actions to get to a goal



GOALS BASED PLANNING VS ISSUES BASED PLANNING

- Goals Based Planning
 - Works from future to present
 - Based on long-range planning (3-5 years)
 - Goals identified as accomplishments
 - Develop action plans for each goal-who, what, when
- Issues Based Planning
 - Works from the present to the future
 - Identification of major issues facing the organization right now
 - Short term plans usually a year
 - Issues are described as questions
 - Develop action plans-who, what, when

7 STEP GUIDE TO STRATEGIC PLANNING



GUIDING PRINCIPLES FOR SUCCESSFUL STRATEGIC PLANNING



PROBLEMS WITH STRATEGIC PLANNING

- Driven by funders
- Ritualized process starring a high paid consultant that takes a long time
- Used to deflect criticism or unrest or used to delay or avoid decision-making
- Don't take financial sustainability seriously
- Should not focus just on goals but on the HOW!
- Big questions still unanswered

NEWER STRATEGIC PLANNING PRACTICES

- Identify 4-5 questions that must be answered at the end of the process; frame questions with yes or no answers
- Strategic Learning Agenda
- The Page
- Fundraising Revamp
- Logic Models and Theory of Change
- Community-Oriented Decision-Making



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REVIEW OF THE SESSION

- What type of planning-Goals-Based or Issues-Based?
- Pre-planning-Agree on Process, Environmental Scan; Identify 4-5 questions that must be answered at the end of the process; frame questions with yes or no answers
- Review org mission, vision, values, operating principles; id goals and key strategies; develop work plans
- Implement plan; update plan; communicate about key strategies and goals
- Problems with Strategic Planning
- Newer practices

QUESTIONS???

Thank you for attending the session today!!!

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