



The Value of Strategic Planning

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About The Presenter: Alyson Small

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- President and Founder of Partec Consulting Group
- More than 25 years of experience serving as a consultant/trainer
- Works with a range of organizations across the United States and Africa
- Specializes in resource development and strategic planning
- Has a B.A. and M.A degree in Economics

Where Is Your Organization Headed?

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We Have...

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We have never operated with a strategic plan.

We have a strategic plan but, it is out of date

We have a strategic plan but, we never look at it.

We have a plan but, need the analyze our environment

We have a strategic plan

The Landscape is Changing...

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Government
funding

Demographics in
your community

Increase/decrease
in competitors

Additional
requirements for
operations

Quality of
workforce pool

Cost of operations

Other?

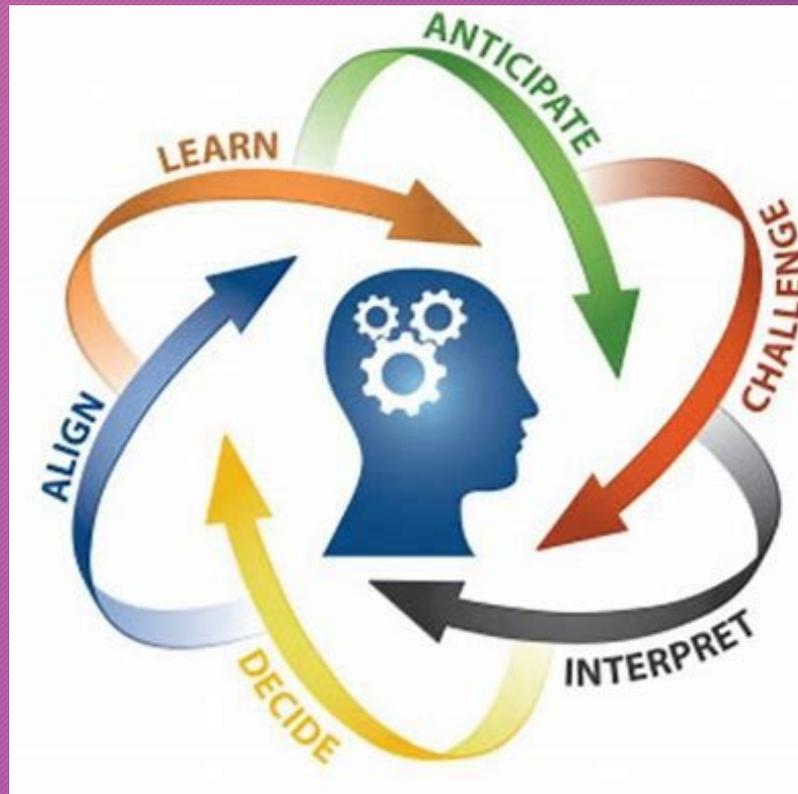
What Is Strategic Thinking?

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- Strategic thinking requires a willingness to consider all alternatives, by asking questions and being open to change.
 - Its not always about creating a new plan versus reevaluating an existing plan
 - Helps think through different strategies given changes in the organization's environment
 - Keeps you functioning strategically versus reactionary

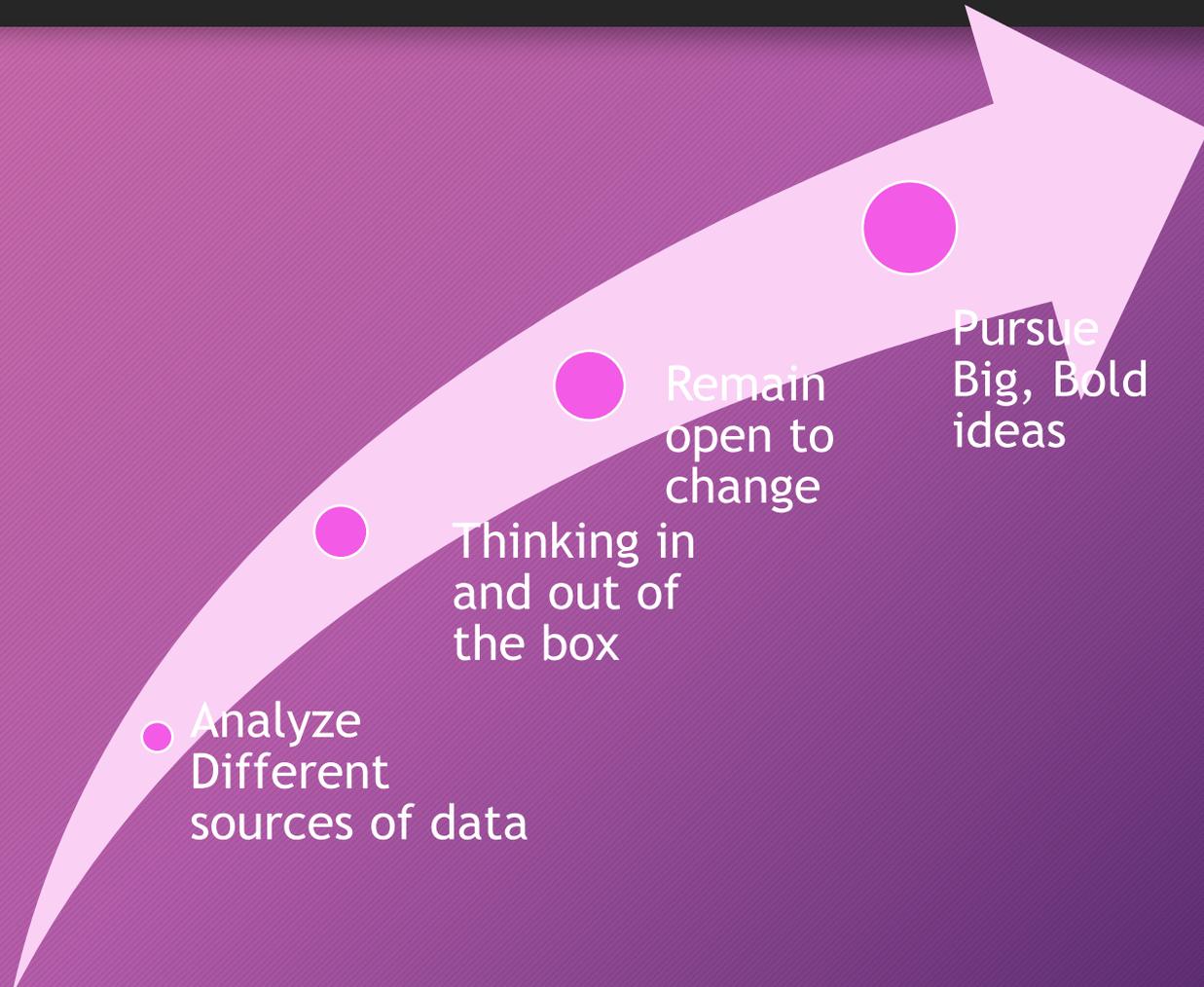
Are You a Strategic Thinker?

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Are You Willing To...?

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● Analyze
Different
sources of data

● Thinking in
and out of
the box

● Remain
open to
change

● Pursue
Big, Bold
ideas

The Importance of Strategic Planning

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- Serves as a roadmap for the organization
- Keeps everyone on the same page
- Connects the organization's purpose with goals to achieve its mission



Taking Stock: Analyzing the Environment

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Who Should Be Involved?

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Your Entire Team!



Strengths

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- Strengths are internal, unique to your organization and makes your organization stand out from others
 - Your reputation
 - Programs and Services Offered
 - Location of your facility
 - Staff
 - Use of technology
 - Size or your organization

Weaknesses

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- A weakness may affect your organization's ability to be truly competitive in the marketplace and requires improvement.
 - Management structure
 - Limited skills among staff
 - Outdated technology
 - Outdated Programs and Services
 - Limited funding streams
 - Repeated complaints by clients

Opportunities

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- Factors contributing to the expansion and growth of your business.
 - New Funding opportunities
 - Changing client demographics
 - Changes in government policy

Threats

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- Threats are issues that might impact the growth and viability of the business
 - Changes in funding sources
 - Changes in client demographics
 - New competitors
 - Changes in political leadership
 - Changes in government regulations

Collecting Data for Analysis

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Internal

Board/staff surveys

Interviews

Discussion groups

- External
 - Interviews with stakeholders
 - Community leaders
 - Clients/customers
 - Other partnering service providers
 - Review of existing reports or studies
 - Discussion groups

Analyzing the Data

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- What is the possible impact of this information on our plans?
- Are there opportunities available to our group to help us achieve our goals?
- What are the openings or breaks for us?
- Do we see any chances for us to be more effective?
- Are there any threats to us achieving our goals?
- Where are the possible obstacles to our work?
- Are there any roadblocks or barriers?

Other Requirements to Planning

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- Mission Statement
- Vision Statement
- Value Statement

Given our environment, do these statements still apply?

- Goals
- Strategies
- Objectives

Builds on the priorities

So, Where Are You?

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- We are on the right path with our plan!
- We might need some tweaking with our existing plan.
- We need to do a deeper dive with SWOT.
- We need a plan.

Take Home Assignment

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- Do you have a strategic plan --- if yes, review it.
- What do like or dislike about your mission, vision and values statements? Make a list.
- Is it time to do a SWOT analysis?

You Can Do It!!!

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