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WHAT IS STRATEGIC PLANNING?

Strategic planning is the process of:

- Clarifying the coalition’s purpose
- Analyzing the internal and external environment
- Setting a clear direction
- Setting concrete goals for the future
- Setting priorities for short and long term

Strategic planning involves looking at the coalition as a complete entity and is concerned with its long term success. This requires looking at where the coalition is now, determining what you want to accomplish, and mapping how to get there.

The strategic plan should be summarized in a written document to ensure that all concerned are clear regarding the goals and objectives the organization is working towards.

How to develop a strategic plan

Developing the plan is a process that may involve discussion with a number of different stakeholder groups and should take place over a period of time. While it is important to document your plan in written form to provide consistent guidance and a reference point for the coalition, this should remain an inter-active process. Your plans should be regularly reviewed to ensure that you are able to anticipate and adapt to challenges and changes in the internal and external environment.

There are a number of key stages in developing your strategic plan:

1. Determining who should be involved in the process and at what stage
2. Analyze where the coalition is now
3. Discuss where the coalition wants to be
4. Determine how the coalition is going to get there
5. Produce a written strategic plan
6. Monitor and review your strategic plan
STRATEGIC PLAN STEP 1 - Who should be involved?

The first stage in development of a strategic plan for the coalition involves determining who needs to be involved in the planning process.

Strategic planning should be initiated by the leaders of the legislative coalition. The first step should be identifying the stakeholders who should be involved in the strategic planning process. Generally, it should involve:

- Those who will be implementing the plan (e.g. coalition volunteers)
- Stakeholders (e.g. coalition members, ASID Leadership and Members, industry partners, etc)
- Those who will monitor its implementation (e.g. coalition leaders, ASID LCAC Members)
- Others who can contribute to its development (e.g. ASID legislative staff, ASID chapter leaders, contract lobbyist, supportive coalitions, etc)

When the coalition leadership has identified who will be involved, it is necessary to decide at what level and how different stakeholders will contribute to the coalition’s planning for the future. There are many different ways stakeholders can be involved, such as:

- Conducting focused workshops open to all stakeholders
- Participation in a series of consultation meetings with specific groups
- A call for written submissions
- Gathering of Information (questionnaires, surveys)
- A steering group made up of a range of stakeholders.

A combination of these approaches is likely to ensure that all stakeholders have a say in developing the strategic plan.
STRATEGIC PLAN STEP 2 - Where We Are Now

Those involved in the strategic planning process must start with reviewing the present circumstances and characteristics of the coalition and environment.

To plan for the future, you first need to reach a common understanding of the present circumstances. To answer this question you will need to focus discussions on two key areas:

- Analyzing the external and internal environment
- Reviewing the coalition’s mission statement and goals

Analyzing the External and Internal Environment
Strategic planning is about having a clear direction to steer towards but also being able to respond to changes as necessary. To do this your coalition needs to have information about the challenges, opportunities and future trends, inside and outside. So whether your coalition is just starting up or is already established, the first step in the planning process is to assess the external and internal position of the coalition. A SWOT analysis is commonly used to identify.

S - Strengths (internal)
W - Weaknesses (internal)
O - Opportunities (external)
T - Threats (external)

Strengths and weaknesses primarily focus within the coalition. Opportunities and threats are primarily outside the coalition. This analysis of the environment allows the coalition to take this into account when planning for its future.

SWOT Analysis of your coalition

STRENGTHS
What the coalition is good at and is doing well e.g.
- Recruiting passionate volunteers
- Bringing together interior designers from different coalitions
- Internally developing consensus behind issues

WEAKNESSES
What the coalition is not good at and which are not going well. Specifically,
- Accessing funding from a wider variety of sources
- Articulating the arguments for licensure
- Communication with stakeholders

OPPORTUNITIES
Events and circumstances that could be used to help the coalition’s mission. Specifically:
- State fire marshal association support
- Identifying legislators with personal ties to interior design
- Gaining support from industry partners
- International Building Code recognition
- Support from Building code officials
THREATS
Events and circumstances that may challenge the coalition’s mission. Specifically:
• Laws that already limit the practice of interior design
• Protectionism by other design professions/organizations
• State budget shortfalls causing cuts to regulatory boards
• Organizations opposed to interior design legislation

** See Appendix 1 – SWOT Analysis **

Reviewing the Coalition’s Mission Statement and Goals
Your SWOT analysis will provide key information on needs, priorities, problems and opportunities. Based on the issues identified, your coalition may need to redefine its mission statement and/or goals. These statements reflect the coalition plans or goals. It is important that each element of the SWOT analysis is used to consider future priorities for the coalition.

** See Appendix 2 – Developing a Mission Statement **
STRATEGIC PLAN STEP 3 - Where We Need to Go

Following a review of the coalition’s current challenges the next stage in strategic planning is to come to a common agreement regarding what the future should look like.

To answer this question you will need to clarify:
- Your Vision
- Your Strategic Goals
- How these will help achieve your mission.

Vision – Long-Term Goals
Identify and write the vision or long-term goals for the coalition. The long term goals should describe specific outcomes that the coalition hopes to achieve in support of the broader mission.

They should:
- Help achieve your mission
- Be limited in numbers (4 to 10)
- Show clear direction
- Be measurable

Strategic Goals – Near-Term
Identify your immediate goals (e.g. determining and creating an advocacy package, meeting with members of a legislative committee, fund raising target, etc) for the next 12-24 months. These goals should emerge from your SWOT analysis of your internal and external environment and their affect on your coalition's future.

** See Appendix 3 – Priorities and Goals **
STRATEGIC PLAN STEP 4 - How We Will Get There

The next step in developing a strategic plan is to work out how to get from where the coalition is at present, to where it wants to be in the future.

Creating a roadmap for achieving the strategic objectives involves the coalition leadership and requires:
• Setting objectives
• Evaluating resources
• Operational/work plans
• Developing and ensuring appropriate infrastructure is in place

Setting Objectives
Your objectives outline how each goal will be achieved. They should be SMART:

S - Specific
M - Measurable
A - Achievable
R - Realistic
T - Time bound

Your SMART objectives will guide the coalition on:
• What will change or be achieved?
• In what way?
• By how much?
• When? By what date?

Your objectives must relate to the strategic goals. It is important to check at this stage that all factors, internal and external, which have a bearing on the objectives set for future work, have been taken into account.

** See Appendix 4 - Strategic Objectives **

Evaluating Resources
The coalition leadership and those involved in the planning process must take into account the resource implications of the plans. They must review what is possible within the coalition’s available resources and where or how additional resources could be procured. This may also highlight gaps in resources such as people required, equipment, or facilities, as well as financial limitations.

Develop Operational / Work Plans
The operational plan outlines the day-to-day program of work based on the goals and practices of the strategic plan. It may also be referred to as an “action plan”, “work plan” or “implementation plan”. This is normally done annually. The detail of the operational plan is linked to each objective of the coalition and will provide information on:
• What will be done
• Who is responsible
• How it will be done
• With what resources:
  • Human - volunteers, staff, leadership
  • Physical - premises, location, equipment
  • Financial
• What success will look like or what targets should be reached
Ensuring an Appropriate Infrastructure

The coalition needs to ensure that it has the necessary infrastructure to achieve its goals and objectives. The infrastructure includes the shape of the coalition, the roles within it, the rules, procedures and policies, and management structures. They should define who is accountable, to whom and for what.

The coalition may need to plan for changes and developments in its existing structure as a result of its future priorities and aims. This may involve reviewing, for example:
- How volunteers and leaders are organized
- Resources such as money, equipment, premises
- Training requirements.
STRATEGIC PLAN STEP 5 - Writing a Strategic Plan

Every coalition should have a written plan for its future development, documenting the outcomes of the strategic planning process. Your plan should outline the coalition, how the coalition plans to achieve its goals and objectives.

It is important that your written plan is ‘bought into’ by your full coalition by involving people at the earliest stages and is not merely a paper exercise.

The extent and detail of your written plan will depend on the nature and size of your coalition, but the following are headings to guide you in structuring your strategic plan:

Contents of a strategic plan document

Executive summary
This is a short document that summarizes the more comprehensive strategic plan in such a way that readers can rapidly become acquainted with your plan without having to read it all. It should contain a brief statement of the problem or proposal covered in the plan, background information, concise analysis and main conclusions.

The executive summary will appear at the beginning of the strategic plan but will be the last part actually written.

Introduction
The purpose of the plan; background about where the coalition is in its development; brief statistics about the numbers of staff/volunteers; a description of the

Mission Statement
The mission statement should be a clear and succinct representation of the coalition’s purpose for existence. It should incorporate meaningful and measurable criteria while being very broad.

Vision
The vision of the coalition should list desired outcomes from the coalition’s efforts over time. This should include major milestones towards fulfillment of the coalition’s mission.

Internal Appraisal
Provide a concise review of the current health of the coalition; summarize the strengths and weaknesses and their implications; make sure you cover key achievements in the previous period.

Future Political Climate
Review the political climate for the upcoming year and determine the political palatability of interior design issues. Outline the challenges for the immediate future (incoming/rising politicians, recent elections, state budget/economic concerns, opposition, etc.).

Strategic Goals and Objectives
Cover the main areas of work the coalition needs to focus on for the next one to two years. Each objective should have key tasks and outcomes associated with it – from which you can develop annual goals and teams and individuals can develop their work plans.

Legislative Proposal
Attach the proposed legislation if already developed and an outline of what the bill will achieve. Include a list of key accomplishments of the legislation. Decide which aspects of the legislation are open to negotiate and which are not and note them as such.
Resources On Hand or Needed
This is where you must be candid about the coalition’s ability to provide resources to carry out the plan. Attach a budget and create an inventory of the resources already available (e.g. people, materials, relationships, etc.). Develop a list of resources needed to achieve the coalition goals and a list of methods to obtain the resources needed.

Projected Timeline
Attach a ‘timeline’ to show when and how the strategic objectives will be met (covering all the main areas of work of the coalition). All events, meetings, and dates of significance should also appear on this timeline.
STRATEGIC PLAN STEP 6 - Monitoring & Reviewing the Strategic Plan

The final step in any planning process is to monitor and evaluate progress. Routine review of the plan is important and will ensure that progress is being made and on track.

The coalition leadership should develop procedures to measure the fulfillment of coalition’s vision and the goals and objectives from the strategic plan.

Before completing your plan, you need to agree how and when it will be monitored and reviewed and what information the coalition leadership needs to receive in order to review progress.

When reviewing progress towards achieving the strategic aims and objectives, the coalition leadership should:
• Ensure that activities are kept within the parameters of the agreed strategic goals and objectives
• Ensure that activities are consistent with coalition’s mission and vision
• Keep under review internal and external changes which may require changes to the coalition’s strategy or affect their ability to achieve their objectives
APPENDIX 1 – SWOT ANALYSIS

CONDUCTING A SWOT ANALYSIS:

A strategic analysis of the coalition and the external environment will enable the coalition to plan more effectively for the future, while taking into account opportunities and potential threats. The following key questions provide a basis for this analysis, but you should not limit your analysis to just these questions.

What are your coalition's strengths and weaknesses?
For example
• What are your main achievements over the last two years?
• How successful have you been in achieving your strategic objectives?
• How effectively have you communicated your achievements to stakeholders?
• How effective are your relationships with other key coalitions in the state?
• How secure is your coalition's financial position?
• Do you have the volunteer levels and expertise necessary to meet your objectives?
• How is your coalition regarded externally? Does it have a good reputation?
• Are you able to build effective relationships with those you wish to influence?
• Do you have a positive relationship with your fund raisers/supporters?
• Is your coalition effective at communicating with members?
• How effective is your infrastructure? Is your coalition well-structured and efficient?
• Does your coalition leadership have the capacity/expertise to meet the demands of the coalition?

What are the key opportunities and threats facing your coalition?
You may wish to consider, for example:
• Audit of laws and regulations governing the practice of interior design
  • Legal scope of work
  • Ability to stamp and seal
  • Ability to submit plans for permit
  • Tax treatment of interior design services
  • Design firm ownership restrictions
  • Ability to subcontract to other design professionals
  • Local building authority policies
• Membership needs
• Demographics
  • The size of the industry
  • Number of practitioners
  • Economic impact of interior design
  • Number of NCIDQ certified designers
  • Interior design education statistics
• Coalitions opposed to your goals
• Recent election and perceived mandates
• Partnerships / collaborative working opportunities
APPENDIX 2 – DEVELOPING A MISSION STATEMENT

The mission statement is...
- The core message of the coalition’s purpose and reason it exists
- What you’re trying to do, why, and for whom

EXERCISE:
In one or two sentences, describe the overall purpose of the coalition in a way that looks to your vision and says what you’re trying to do and for whom.
APPENDIX 3 – PRIORITIES AND GOALS

Strategic goals set out priority areas of work for the Coalition. Your strategic goals should:
• Help achieve your mission (overall purpose)
• Be limited in number (i.e. 4 to 10)
• Show clear direction

Exercise:
1. From your SWOT analysis and review of achievements, make a list of themed priority areas of work for your coalition. (1 or 2 words only)
   
   Example:   Education
              Outreach
              Lobbying
              Fund Raising

2. Does the list of key words fit with your coalition’s core purpose/mission? Can these key words form the basis of your long-term goals?
3. From your SWOT analysis, are there opportunities / new areas of work that fit your mission, and should be included in your long-term aims?
4. Finalize your list of priority areas of work for the next 2 years.
APPENDIX 4 - STRATEGIC OBJECTIVES

Strategic objectives give an idea of key activities (key areas of work) that are required to achieve each long-term goal. You may wish to refer back to your SWOT at this stage, to check that all factors (both internal and external) that may have a bearing on your objectives have been taken into account.

Exercise:
Consider each long-term goal and list up to 6 activities that will:
• Have the greatest impact
• Make best use of resources
• Help achieve the goal (and hence the coalition’s mission)

Remember, each objective should be:
S - Specific
M - Measurable
A - Achievable
R - Realistic
T - Time bound