

“I skate to where I think the puck will be.”

-Wayne Gretzky

River Network

Strategic Planning Process Outline

Purposes

1. Keep people from burning out.
2. Make the organization stronger five years from today.
3. Help your team **win**.

Evaluating your current plan

- ☐ Is it a compelling vision for your stakeholders and members?
- ☐ Does the plan increase “Name ID” and public understanding of your organization?
- ☐ Do you have agreement on the tangible outcomes that you will pursue and specific timeframes?
- ☐ Are your objectives “balanced” to include: external objectives (to save specific rivers or change policies), internal objectives (to grow your capacity and organization), and community outreach objectives (i.e. improving media relationships).
- ☐ Have you developed action plans to help you reach those outcomes?
- ☐ Does your plan give clear evaluation points?

Getting Started

So, where does your team think the puck is now? Where will it go next? Who will have it and how can you get it back? When will you be ready to make a goal?

Step 1. Prepare a Situational Analysis. Members of the planning committee should prepare an Internal Analysis (strengths and weaknesses), an External Analysis (opportunities and threats) and a Financial Analysis. The purpose is to help the group come to agreement on “*where the puck is and where it will go next*”. Once those analyses are in hand the group needs some time to digest the information and discuss the materials.

Step 2. Clarify Values and Vision. The group needs to discuss how the current mission statement (or current organizational direction) resonates with each person and what they value most about it. After that discussion you can assign someone to finish re-drafting if necessary.

Step 3. Resolve Strategic Issues and Priorities

This is the TRICKY PART! Staff can write up a few questions in advance of the meeting, then the full group can break into teams to try and answer the most important. The most valuable questions are very concrete and meet these criteria:

- 1) Must be answerable by our group (i.e. "Should we represent fishermen or boaters in the upcoming battle over the last two drops of water?")
- 2) Must be affected by our strengths, weaknesses, opportunities or threats (i.e. "This is a really a big deal for our state no matter what we think"), and
- 3) Must have significant consequences to the success of group (i.e. "We'll always be seen as losers if we blow this one").
- 4) Provide clear alternatives or risks to the organization (i.e. "We can either do this or that but not both")

Step 4. Agree on Tangible, Feasible and Measurable 5-year Objectives. The planning committee can meet in advance and make recommendations to the board. Then the board will have more time to discuss the steps necessary to achieve those objectives.

After the Planning Retreat - Next Steps - Discuss what guidelines and criteria will be used to choose 5- year objectives and who will make what kinds of decisions. Items like re-writing staff and board job descriptions may need to be delegated.

Planning Step 1. PUT IT IN WRITING! Following up on the work done at the retreat to create a public document is critical. There should be some pretty specific action plans with dates and info on who does what for the first year, getting more general for other years. Both the strategic plan and the annual action plans would be drafted by committee and staff and submitted to the board for approval.

Planning Step 2. Implement and Reassess. The board should refer to this plan at every board meeting and update it at least every two years. Reporting on how the plan is being implemented should help manage board meetings and keep the group on track. The board needs to annually do four things 1) evaluate progress towards your current objectives, 2) consider new strategic directions, 3) set new program priorities, and 4) adopt an annual budget and work plan.